NPTA MANAGEMENT NEWS
FEBRUARY 1987

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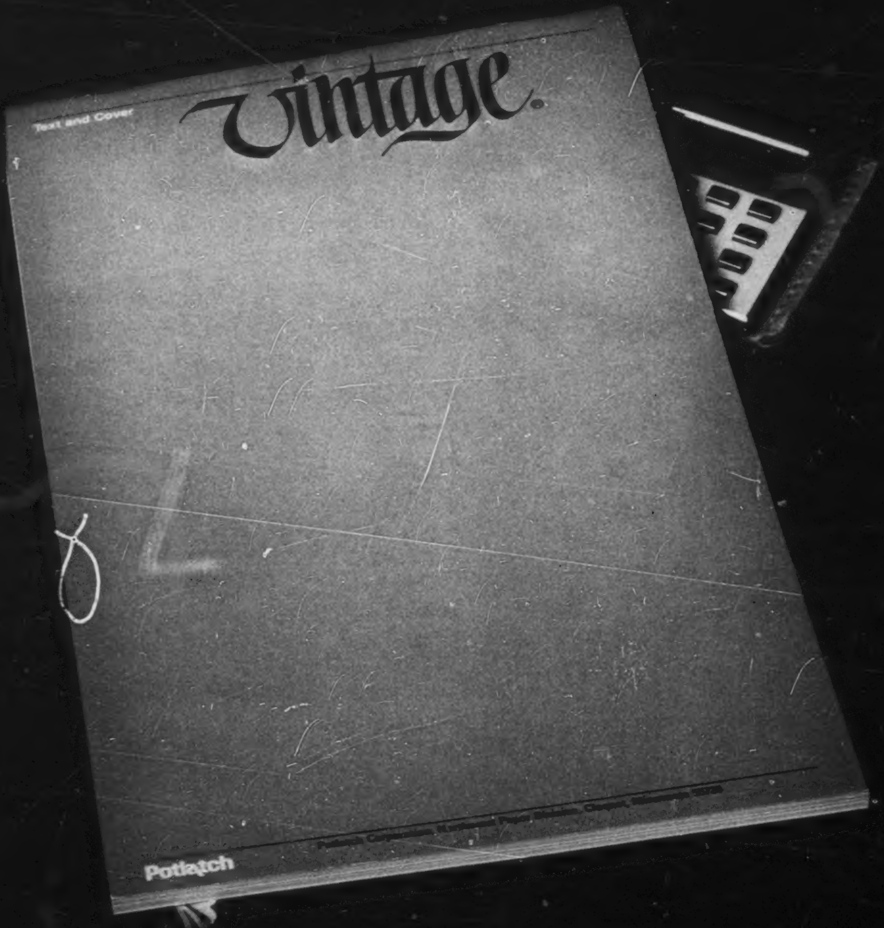

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Cover Photo: Vera Elyjiw

FEEDBACK

Open Forum

The opinions, ideas, and concerns of the readers are important to the National Paper Trade Association—The Publisher of Management News. To get your thoughts in print, direct your correspondence to the editor.

Letters, A Large Step Forward For MN

The introduction of a members' response column to the NPTA monthly magazine is quite a large leap forward for all parties. The NPTA organization as well as individual members.

Reducing the gap between quantum numbers that are gathered by ceaseless surveys and which lead to huge impersonal generalizations and the individual views of a specific entity whose needs are made unique by a plethora of circumstances is a most positive gesture.

The NPTA will learn more about the specific problems of its members. Spontaneous positions can open up new areas of inquiry which will be beneficial to all. This can aid in the analysis of existing programs and a supplementary review of their merits.

The larger, multi-unit members can gain by reading the views of other members and thus maintain some touch with individualistic points of view.

An independent member can voice positions as well as review the thoughts of others like himself among the participants of the column. This must add materially to the success of the venture.

In short, any vehicle that adds a spontaneous contribution to thoughts and thus, ideas, is a very large step forward toward general enlightenment.

I congratulate you on your effort.

Elwyn Lieberman, President
Allan & Gray Corporation
New York, NY

Education Never Ends

The work you are doing here and elsewhere in educating paper people in the ways of the printing world needs all the support and approval it can get. I have worked with each group that has been here taking the joint NPTA/RIT sponsored course called "Printech Week" and their enthusiasm and dedication are a joy to see.

There is more, too, that needs to be done to continue the educating of paper distributors in the fast moving world of graphic arts. We find a revolution in color printing—much more volume and higher demands for quality in four color (and five and six color) work. The need to understand color and multicolor printing is very important, and should become a part of the working vocabulary of fine paper salespersons. With fast, multicolor presses both web and sheetfed commonplace, there is a big need for expert, fast and responsive trouble shooting to keep production rolling in the face of high costs. In the pre-press arena, electronic image manipulation and scanning have made tremendous strides, and should be understood by your people.

Keep on doing what you are doing in the training and instruction of your fine paper people. We will run out of time before we run out of the need for continuing training and education in the graphic arts!

William S. Eisner
Director, Research & Development
Rochester Institute of Techhnology
Rochester, NY

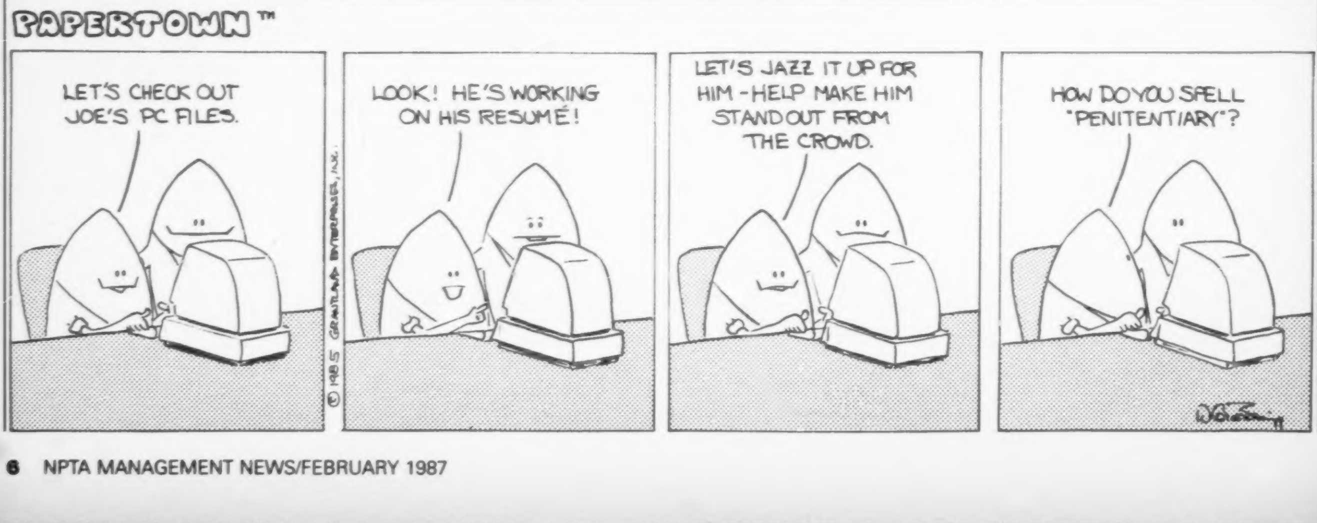
Applause for MN

My sincere congratulations on the outstanding job you have done over the last couple of years in developing the NPTA *Management News* magazine. I am particularly pleased now that we are able to offer this to our sales people, also.

If our industry is to continue to grow, it is necessary that we educate all of our employees on the issues and opportunities. Your magazine goes a long way in helping management inform our sales people of the issues.

My best wishes for continued success with the magazine.

George T. Jewett, President
Mead Merchants, Central Area
Cincinnati, OH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Alling and Cory Names New President

The following management changes were announced by Alling and Cory, effective as of last November. Samuel T. Hubbard, Jr., was elected president, CEO and a member of the board of directors. He was also named to the executive committee. Mr. Hubbard joined Alling and Cory in 1985 as assistant vice president and was formerly a vice president of Chase Lincoln First Bank, NA.

J.L. Nevill Smythe was elected vice chairman of the board and reappointed to the executive committee. After 38 years with the company and with his own J.L.N. Smythe Company, he will retire in June of 1987 though he will remain a member of the board.

Philip W. Seefried, general manager of the company's New York division, was elected senior vice president and appointed to the executive committee. John P. Maddock was elected senior vice president of marketing-printing papers, and he will retain his responsibilities as general manager of the Philadelphia division. Paul Carney was elected senior vice president of marketing-industrial products and packaging, and Robert G. Preston, general manager of the Harrisburg/Baltimore division, was elected vice president.

Richard M. Harris, Jr., continuing as chairman of the board and of the executive committee, will now devote full time to long range planning, mergers and acquisitions, shareowner relations, personnel development and similar programs.

Samuel T. Hubbard, Jr.

Paper Distribution Industry
Best Sellers

Rank	Publication	Last Mo.
1	Paper Merchant's Guide to Profitable Management. *NPTA.* $49.	9
2	Fine Paper Catalog. *Grade Finders.* $55.	1
3	Paper Merchant's Guide to Personnel Selection and Evaluation. *NPTA.* $85.	5
4	Strategic Planning: A Fitness Program for Wholesalers. *Arthur Andersen.* $35.	—
5	Improving Profits Through Better Marketing: The Marketing Productivity Audit. *Healy.* $35.	2
6	Measuring Customer and Product Line Profitability. *Mullins.* $35.	4
7	The Practical Handbook of Warehousing. *Ackerman.* $40.	6
8	Win-Win Telemarketing Program. *S. Michael Zibrun.* $135.	—
9	Printing Paper Sales Compensation. *NPTA.* $40.	7
10	The U.S. Paper Distribution Industry: A Market Research Data Source. *NPTA.*	8

All publications are available from NPTA

G-P's CEO is Called the Best in the Industry

For the third consecutive year, T. Marshall Hahn Jr., chairman and CEO of the Georgia-Pacific Corp., was named the best chief executive in the paper industry by *The Wall Street Transcript.* Mr. Hahn, who joined G-P in 1975, was cited for his efforts to reduce the company's dependence upon the cyclical building products industry, to increase the company's value-added product line, and to make strategic decisions that are "particularly conscious of shareholder values."

The *Transcript* based its selection on interviews with industry executives, leading financial analysts, trade journalists and others who rate the extent to which the CEO has enhanced "the overall value of the enterprise for the benefit of the stockholders."

Zellerbach Realigns Management, Elects Sawka President

Zellerbach Paper Company, which was recently acquired by Mead Corporation, has announced that John Sawka has been elected company president. Mr. Sawka will be responsible for 25 Western operations, located in 11 Western states, which account for sales of approximately $650 million.

Phil Ferris has been appointed vice president, administration, with responsibility for financial, human resources and data processing areas. Dale Simonsen has been named executive vice president, marketing, for both the Printing and Industrial businesses.

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divided into four geographic areas, each of which is to be supervised by an area president. Alan S. Gralnick has been named president of the Northwest Area, headquartered in Seattle; Richard W. Lenertz has been named president of the Intermountain Area, located in Denver; Arthur D. Mattox will be president of the Southern Area, with headquarters in Los Angeles; and David L. Rhodes will be president of the Western Area with offices in San Francisco.

"This is a market-driven, strongly competitive business and the current restructuring will permit us to streamline operations and still maintain a high level of service," Sawka said. He noted that "the Zellerbach name will remain strong in the West, and we're excited about the opportunities before us."

New Magazine Aimed at Graphic Arts Recruiting

Recognizing the need to encourage young students to consider careers in the graphic communications industry, a new magazine called *Image World* will be published by the Rochester Institute of Technology's College of Graphic Arts and Photography.

According to Mark DuPre, the editor, *Image World* will be a four-color, eight page, 11x17 magazine with "eye-popping graphics and solid editorials that's directed squarely at high school juniors, seniors and community college students facing their first career choice. It demonstrates how new technology is transforming graphic communications and informs students of educational requirements and opportunities."

Funding for *Image World* comes from the Graphic Arts Education and Research Foundation, which was established several years ago by the Graphic Arts Show Company to provide funding for worthy industry-educational projects. The GASC was formed by the National Printing Equipment and Supply Association, the National Association of Printers and Lithographers and Printing Industries of America to manage the GraphExpo and Print shows. Funding for the Foundation comes from the profits of the shows. If you would like to receive a sample copy of *Image World*, write to Mark DuPre, T&E Center/RIT, 1 Lomb Memorial Drive, Rochester, NY 14623.

Award Named for "Sox" Calder by Union Camp

Alexander Calder, Jr., former chairman and CEO of Union Camp Corporation, has been honored in two ways: an annual award carrying his name has been established by his company, and on December 5, 1986, he received from the U.S. Department of the Interior and The Nature Conservancy, their highest tributes to an individual for public service in the interests of conservation.

Alexander Calder, Jr.

The Alexander Calder Conservation Award will carry an unrestricted grant of $5,000 to each recipient. Nomination criteria and the selection of a panel of judges is yet to come.

The Secretary of the Interior's Award was given for "his actions over the years at Union Camp" that "not only helped save many ecosystems but showed industry what a crucial role it can play in preserving biological diversity."

To date, Union Camp has made eleven major land donations totaling 78,000 acres valued at $23 million to various agencies and organizations.

FEBRUARY

13. *Managing Customer and Product Line Profitability—A Key to Survival in the '80s, Minneapolis, MN; Innisbrook Resort, Tarpon Springs, FL. Contact NPTA.*

MARCH

5. *Boston Paper Trade Association's Annual Meeting. Contact Albin Johnson, Jr.; 617-748-2272.*

19–21. *Young Executive Forum Presents Third Annual Mid-Year Executive Conference. The Grenelefe Resort, Grenelefe, FL. Contact NPTA.*

APRIL

26–May 1 *Printech Week, Rochester Institute of Technology, Rochester, NY. Contact NPTA.*

SPMA Publishes New Directory of Members

The Southwestern Paper Merchants Association (SPMA) and the Paper Suppliers Association of the Southwest (PSAS) issued their 1986–87 directory, listing, as it has for the past 23 years, members' names and addresses as well as the products/services offered.

In a related announcement, the management firm of Banks Miller and Associates will represent both the Southern Paper Trade Association and the Southerners (paper suppliers).

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The result? Stated simply, ***Paper Tiger WORKS.*** It's the *COMPLETE* system for the paper merchant. It gives you instant access to accurate, timely data that helps provide your customers with better service. As a result you sell more product, operate more efficiently and are more profitable.

If you think that these are pretty tough claims, you're right. But *CPI* and *Paper Tiger* deliver on every one of them—and more.

So, why not give us a call. We'll send you, with no obligation, an information package that details how ***Paper Tiger*** can improve your business. And you'll be taking the first step towards better sales, service and profits, plus one more extra we didn't mention—peace of mind.

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Tss Festivale

The New York Paper Merchants Association aboard the cruise ship T.S.S. Festivale for their recent seminar on the high seas. They visited St. Martin, Barbados, Martinique, St. Thomas and San Juan. Another cruising seminar is planned for November of 1987 and all NPTA members are invited.

Mead Enters Merger Agreement With Ampad

Mead Corporation is to acquire Ampad Corporation, a manufacturer of paper-based supplies. The Ampad board of directors unanimously authorized the all-cash sale. Based in Holyoke, MA, Ampad markets its products through more than 6,000 stationers and college book stores, with sales totaling $130 million for the year ending August 30, 1986.

"We want to continue to grow in the school and office supplies business," said Mead's board chairman Burnell R. Roberts. "We recognize Ampad as a sound, successful company that will complement our Mead Products operations very well."

Schlosser Donates His Historical Paper Collection to Library

Leonard B. Schlosser, chairman of Lindenmeyr Paper Corporation, has donated his extensive collection of items related to the history of papermaking to the New York Public Library. The announcement of the gift was made by Library president Vartan Gregorian at the Library's annual Literary Lions dinner on November 11, 1986.

The collection, which contains over 3,000 rare volumes, drawings and other items, dating from 770 A.D. to the present, will be open for use by researchers and scholars after it is formally cataloged and housed in the Print Room at the Central Research Library, Fifth Avenue and 42nd Street.

Some of the collection's highlights include ancient specimens of Japanese paper from the 8th Century; the first book of trades, Frankfurt, 1568, with illustrations of papermaking by Jost Amman; early engineering works, including one by Vittorio Zonca, Padua, 1607, showing a stamping mill for the preparation of paper pulp; and the first great technical work on papermaking, *Art de faire le papier*, Paris, 1761. One of a number of books unique in America is Thomas Churchyard's *A Sparke of Friendship*, 1588, the earliest description of English papermaking, printed on paper watermarked with the royal arms of Elizabeth I.

Mr. Schlosser noted that his "childhood memories are filled with vignettes of a father, consumed by his business as a paper merchant, looking for watermarks in the day's correspondance at the breakfast table before reading the letters' contents, or closely inspecting restaurant menus for quality of paper and printing before ordering food. I, too, found myself immersed in this world, and, happily, was able to combine the interests of business, avocation, technical training and esthetics to develop this rather unusual collection of papermaking."

Though Mr. Schlosser found it difficult to part with his collection, he said that he was "comforted" that he had "found the right home for it at the New York Public Library."

Star Forms to be Acquired by Bowater, Inc.

Star Forms, a privately held company will be purchased by Bowater, Inc. of Darien, CT, the company reported. The $60 million transaction will place Star Forms as a wholly-owned subsidiary of Bowater, but will operate as a separate company.

"The additional financial strength and purchasing efficiencies we gain from this merger," said Star president and CEO Hunt Harris, "will help assure the long term success of our company, our employees and our distributor customers."

Star Forms employs 360 people and had 1986 sales of $115 million.

Impact of Off-Shore Printing Paper Imports to be Studied by WWA

A second major study to assess the implications to the U.S. and Canadian paper industries resulting from the continuing penetration by off-shore printing paper imports will be undertaken by Walker Wiener Associates (WWA) of Briarcliff Manor, NY. Joining in the study will be Jaakko Poyry Oy of Helsinki, Finland, a leading forest products engineering and consulting firm, and Walker Watson Associates, an international marketing research firm in Guildford, England.

During 1986, WWA had done an initial study of the situation which was reported on in the Sept. 22, 1986 issue of *Forbes* magazine. During the first nine months

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of 1986, off-shore imports of newsprint, printing and writing papers were running at almost the same levels as in 1985, but it is expected that by year's end, imports will be up 2.1% over 1985's total.

The new study will assess the U.S. import outlook for each of the six major printing and writing grades—newsprint, uncoated groundwood, supercalendered printing papers, coated groundwood and free sheet, and uncoated free sheet. A world (and U.S.) supply/demand analysis through 1991, identification of new world capacity coming on stream, profiles of the leading world exporters to the U.S. and market trend profiles of each major end-use market will be included in the study.

A study completion date is planned for the first week of June, 1987. All study sponsors will be invited to a free one-day seminar in the New York City area. (The first study was sponsored by over 30 companies throughout the world). A copy of the full study prospectus can be obtained by writing Mr. Norman Wiener, vice president, Walker Wiener Associates, 190 North State Road, Briarcliff Manor, NY 10510.

Butler Paper Breaks Ground for New Facility

Butler Paper Company, a part of Great Northern Nekoosa Corporation, recently broke ground for a new warehouse and office facility in Glen Burnie, near Baltimore. The $1.2 million, 32,000 square foot building will incorporate the latest in lighting, heating and materials handling systems. The new facility, which replaces an older leased building, will occupy a 3.6 acre site in the Baymeadow Industrial Park, which was chosen with an eye toward future expansion.

Housing the Homeless

A novel building material from an unexpected source is being considered as a solution to house the homeless—cardboard! Stone Container of Chicago is working with the relief organization World Shelters to distribute inexpensive yet solid corrugated cardboard structures to act as houses, schools, hospitals and base camps worldwide.

Treated with a water-resistant, flame-retardant material, a Stone Relief House is said to be good for three to five years, while a tent may last for only 90 days. The units are collapsible and may also be linked in modular form to create larger structures.

Simpson Buys Champion Mill in Pasadena, TX

It was less than two years ago that Simpson Paper Company purchased Champion's Tacoma, WA kraft mill. Now, the two companies have come to an agreement where Champion's Pasadena, TX mill will be purchased by Simpson. The mill produces 760 tons per day of coated and uncoated free-sheet papers for printing and converting and employs 985 people.

Commenting on the sales was Champion's chairman and CEO Andrew C. Sigler who said that while it is always hard to sell a long time part of the company "Simpson's interest in the Pasadena mill speaks well for the future of that facility."

The agreement calls for Champion to continue to supply wood to the mill and to market some of the paper produced there. None of Champion's one million acres of timberland in Texas will be sold, the company reported. The deal is subject to the approval of Simpson's board.

Scott's Packaging Merges into Scott Worldwide

A new group, Scott Worldwide, combines the Scott Paper Co.'s U.S.-based packaged products division, its international subsidiary and its Scott nonwovens division. The company will operate

We won't let tomorrow take you by surprise.

The #15 paper machine building at the Riverdale, Alabama, plant.

Keeping our Merchants in Hammermill papers is what keeps us in business. So to keep up with their needs, we've invested nearly a half-billion dollars in new and updated equipment.

ADDING A NEW MACHINE ADDS 185,000 TONS OF CAPACITY.

The new 315" paper machine at our Riverdale, Alabama, plant is coming on line this fall—months ahead of schedule. And when it does, there'll be 30% more of Hammermill's fine business and printing papers to go around. Much of this capacity increase will go to meet our customers' total offset requirement, including economy offset. Riverdale will be shipping to *all* of our Merchants; which means faster service to the Sunbelt and our northern customers, too. Plus freed-up production time for additional tonnage from our northern machines.

NEW MACHINES AT ERIE INCREASE PRODUCTIVITY, QUALITY.

At our commercial printing paper plant in Erie, we've replaced two older paper machines with state-of-the-art computer-controlled units that help Hammermill make more paper to tighter standards and still hold the line on costs. A unique new in-line embossing/sheeting and packaging machine has substantially increased our embossing capacity.

Some $20 million of the latest wood-handling equipment provides improved chip—and thus pulp and paper—quality. And we've spent $35 million to update and automate our roll handling and wrapping equipment and to add new precision folio-size sheeters.

LOCK HAVEN LOCKS IN EXTRA COPIER PAPER CAPACITY.

Rebuilds of two paper machines at our Lock Haven plant have made copier paper production hum.

And the addition of a third Will sheeter (it holds the world's production record for cut-size sheets) has increased Lock Haven's finishing capacity significantly.

HAL: MADE TO ORDER FOR FASTER SERVICE.

HAL stands for Hammermill Access Link, a computerized telecommunications system that gives Merchants instant access to our mill inventory.

Placing and tracing orders is now quicker, easier and practically mistake-proof. Invoice printing is faster.

And that's only the beginning. HAL is benefiting our customers and company, and we're already developing new ways to use it.

Hammermill recognizes how the changing needs of the marketplace affect our distributors.

So it should come as no surprise that we're committed to doing all we can to help keep their future bright.

In fact, we've already done it.

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"The reorganization will allow Scott to unleash the full potential" of its worldwide businesses, said company chairman and CEO Philip E. Lippincott.

News Briefs

THE NATIONAL COMPOSITION ASSOCIATION announced its 16th annual Typographic Excellence Awards competition. Entries may be produced on photocomposition or laser typesetters, desktop publishing systems or other electronic printing equipment, or by hot metal. Pieces must have been created after January 1, 1986, and be submitted by February 15, 1987, for an early bird discount, or by March 4, 1987. The judges are established typographers and designers. Contact the Association at 1730 North Lynn Street, Arlington, VA 22209; 703–841-8165, for entry forms and fees.

THE GRAPHIC ARTS TECHNICAL FOUNDATION (GATF) has a new director, Ralph E. Kennickell, who is head of the U.S. Government Printing Office. "I am deeply honored," said Mr. Kennickell. "The graphic arts industry in this country and the U.S. Government Printing Office share a long tradition of working closely together. I look forward to fulfilling my tenure and to supporting the important and interesting efforts of the GATF."

CORPORATE RECRUITERS, INC., which specializes in personnel for the sales and marketing areas of the paper and packaging industry, has a new address: 890 Elm Grove Road, Suite 212, Elm Grove, WI 53122; 414–785–1920.

ST. RAYMOND PAPER COMPANY, INC., invested over $4 million in capital improvements, with more planned for 1987. Upgrades to the fourdriniers, press sections, and dryer sections were designed to improve formation and provide for a better moisture profile. Additional changes were made at the company's two pulp mills to improve the quality and uniformity of the groundwood. And finally, a quality assurance program was implemented to ensure that all customer specifications are met.

DRUTH PACKAGING CORP.'s manufacturing facilities and offices are now located at 120 Nassau Terminal Road, New Hyde Park, NY 11040; 516–358–7500.

LOUISIANA-PACIFIC CORP., a firm with 120 plants and mills in 23 states, completed its purchase of Timber Realization Company's California properties for $95 million. Included are about 98,000 acres of redwood and Douglas fir timberland and a sawmill near Ukiah, CA.

PAPER CORPORATION OF AMERICA, parent company of Saxon Paper-Florida, after recently acquiring Unijax Inc., has decided to merge the Unijax/Miami Printing Paper and Graphic Arts Supply departments into Saxon. The merger became effective November 1, 1986. Burt Kushel, V.P./sales manager of Saxon will continue to head the company's sales force and Catherine Brown of Unijax will become manager of the graphic arts department.

NEENAH PAPER, a division of Kimberly Clark Corporation, named Weidert Grapentin Advertising, Inc., of Appleton, WI, its public relations firm. The agency will assist the company with public relations activities and be responsible for the distribution of publicity information to all Neenah Paper merchants as well as applicable industry, trade and community publications.

NPTA vice president for communications William H. Frohlich authored a report on paper distribution that appeared in the November, 1986 edition of the *Printing Journal* titled *Paper Merchants Respond to Changing Printer Needs.* Free reprints may be obtained by writing to the NPTA Communications Department at 111 Great Neck Road, Great Neck, NY 11021.

BAKCO DATA, INC. has announced a newly enhanced version of its Warehouse Management System which is designed to increase space utilization, reduce picking time and help decrease the overall corporate inventory investment.

The system automatically determines the most effective location to store particular items, based on size and weight considerations as well as frequency of use. It then issues specific picking instructions to help maximize efficiency in filling orders, thus, it is claimed, reducing the number of warehouse people needed to accomplish the same amount of work. Bakco also claims that their system controls inventory more accurately than manual or other automated systems, resulting in the need for less inventory while maintaining the same customer service levels.

Bakco says that the Warehouse Management System runs on Hewlett-Packard 3000 Series minicomputers, requires no prior computer expertise, comes fully customized and with full training and implementation support.

If you are interested in more information, Bakco Data, Inc. is located at 1417 Lake Cook Road, Deerfield, IL 60015, telephone (312)940-8330.

People in the News

Dennis A. Corrado is the new executive vice president and general manager of Gummed Papers of America, and former sales representative **M. Andrew Madden** is the new regional manager of Gummed Papers West.

Nelson S. Mead is retiring as senior vice president, international, of Mead. Mr. Mead, who will continue to serve as a director on the board, was responsible for the establishment of the Mead Aviation department and for the development of overseas markets for the company.

The board of directors has made several personnel assignments following the retirement announcement. **John W. Herbert** is now senior vice president of the Consumer, Distribution and Specialty divisions. **James Van Vleck** was elected senior vice president, international, and **John E. Franz** succeeds him as president of Mead Distribution, a coast-to-coast network for paper, packaging and related supplies. Former vice president of marketing for the company, **Jerome F. Tatar** is the new president of Mead Fine Paper. **Wallace O. Nugent** is corporate vice president of marketing and supply, and **Dennis L. Rediker** is director of strategy and planning.

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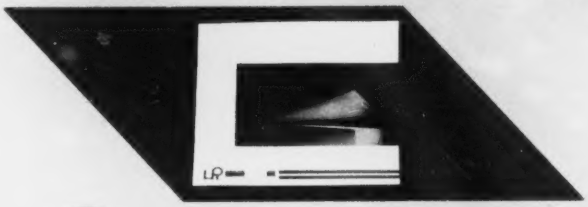

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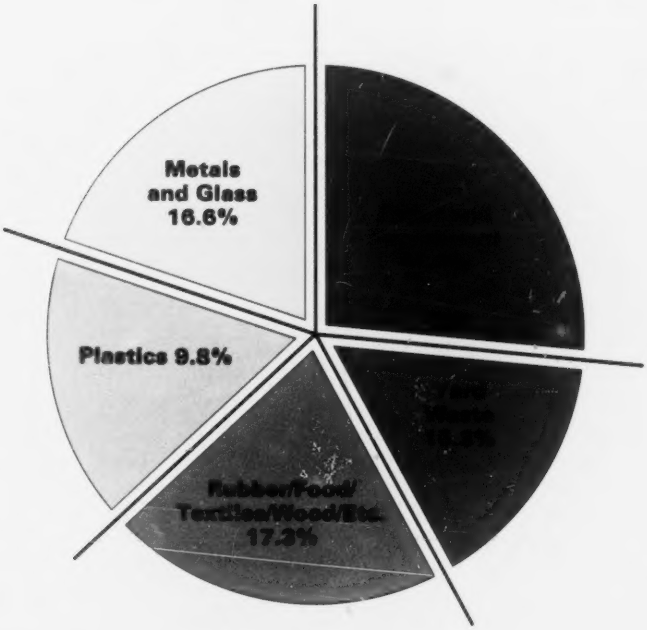

Discarded Materials in the Year 2000

Paper and Paperboard— No. 1 in Discarded Waste

According to a study prepared for the Environmental Protection Agency by Franklin Associates, Ltd., paper and paperboard products have become the number one problem of discarded waste. (These are the products discarded after material recovery has taken place but not before energy recovery.) The report, entitled "Characterization of Municipal Solid Waste in the U.S.—1960–2000," outlines the changing trends in the disposal of materials and in products in the waste stream.

The report estimates that by the year 2000, paper and paperboard products will account for 41% of all municipal waste—a total of 65.1 million tons. Between 1970 and 1984, tonnage of paper and paperboard waste increased by 12.9 million tons to 49.4 million tons in 1984—up from 36.5 million tons in 1970.

The report also shows dramatic increases projected for plastic product waste with a total of 15.5 million tons by the year 2000 or 9.8% of the total waste. Plastic products showed a strong rise over a 15 year period growing from 3.0 million tons in 1970 to 9.6 million tons in 1984.

The report unfortunately projects that by the year 2000 paper, paperboard and plastic products will make up over 50% of all the materials discarded into the municipal waste stream. The only other products that come close to the dimensions of paper and plastics are "yard products," projected to reach 24.4 million tons by the year 2000, metals at 14.3 million tons by 2000, glass at 12.1 million tons and food wastes at 10.8 million tons by the year 2000.

The reason for the dramatic increase in paper and plastics municipal waste is due to the incredible rise in the use of paper and plastic packaging, fast food disposables and other single service disposable products. Experts have been telling us for the last few years that we are quickly becoming a "disposable" society. While the significant advantages in the use of disposable products are easily seen, the dramatic problem of waste is as readily noticed.

Public service campaigns have helped, but the problem, according to the Franklin Associates report, will continue to grow. The products not as easily recognized as part of this problem are the paper packaging items, such as brick-pack packaging, food packaging and other newer packaging items which have taken on a disposable style.

The growth in the market for these new products has been due in part to industrial paper distribution innovation and expertise. Both areas, however, are cause for concern for NPTA industrial members. Reports such as this one, plus other information being made public by the EPA and possible legislative issues which may result, are of concern to all paper distributors.

Should you wish to have a copy of the "Characterization of Municipal Solid Waste in the U.S.—1960–2000," you can order it by contacting Marge Franklin, Franklin Associates, Ltd., 4121 West 83rd Street, Suite 108, Prairie Village, KS 66208. The cost is $500.

Single Service in Country's Vision of the Future

More single service packaging will be part of the lifestyle of the 1980's and early 1990's, according to Russell Jones, president of Quaker Oats food service division. In his address to the Society for Foodservice Management's Annual Fall Conference last October, Jones predicted that there would be more aseptic packaging, home delivery by higher-priced restaurants, and computerized food deliveries to employees' desks. According to *Nation's Restaurant News*, the executive also sees acceptance of dehydrated foods, as well as "artificial" vegetables and meats.

Jones also insisted that the food service industry must solve its sanitation and safety problems: "Our industry is a walking time bomb on safety." He says there should be non-commercial preplated meals, tamper-proof items, better content expiration labeling, and a sterile

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Microwaves Change Food Industry Patterns

Microwaves are changing the way America eats, no question about it, reports *Adweek* magazine. Smaller, lower-cost microwaves are appearing in recreational vehicles, summer cottages, college dorms, and recreation rooms in homes. Families with both parents working and one-or two-person households are spurring demand for the ovens, which are now found in almost 50% of all households. Most frequently used for snacks or reheating, microwaves have become for some people more desirable than a dishwasher.

Survey Reports Package Printing Market

The latest information available from the Flexographic Technical Association (FTA) shows that there are over 4,000 plants in the United States, with another 415 in Canada, utilizing flexographic printing. The total size of the flexo printing market is estimated to be $30 billion (1983).

The FTA reports that the number of plants in operation by market segment in the U.S. (see table) represent approximately 21,400 presses. The entire flexographic printing/converting industry in the United States employs over 150,000 people.

The Fastfood that Changed the World: McDonald's

According to a new book "Behind the Arches" which chronicles McDonald's claim to fame by John F. Love, 7% of American workers, one out of every 15, got their first job from McDonald's. Due to the success of Chicken McNuggets, McDonald's is the second largest chicken retailer in the U.S. 96% of American consumers ate at a McDonald's last year and it serves 7% of the U.S. population each day!

Furthermore, McDonald's accounts for 5% of all Coca-Cola sold—if McDonald's were a country it would be the sixth largest consumer nation of Coke.

And lastly, if you would have been wise enough to purchase a signal share of McDonald's stock 20 years ago for $22.50 that share would be worth $4,000 today! (How many of you let those shares slip through your hands?)

SELECTED MARKET SEGMENTS	# OF PLANTS	% OF TOTAL
Flexible Packaging:	781	19.3
Corrugated Containers	1,000	24.7
Labels, Tags & Tapes	1,506	37.3
All Segments	4,042	100.0%

Size and Structure of U.S. Printing Paper Distribution

A nearly $15 billion market, printing and writing papers handled by distributors has grown 59% in just four years.

Total U.S. wholesale sales of printing and writing paper by merchant wholesalers are estimated to have reached $14 billion by year-end 1985. Official government statistics from the 1982 Census of Wholesale Trade put the size of the market at $9.3 billion four years ago. Since then, based on annual NPTA PAR (Performance Analysis Report) surveys, the market grew 14.6% in 1983, 24.5% in 1984 and 5.6% during 1985. Based on NPTA's monthly Paper Merchant Sales Report, year-to-date printing paper sales through October of 1986 are up 6%. Consequently, by year-end 1986 the market should hit $14.8 billion.

Market Segments & Customer End-Users

Nearly 74% of total printing paper sales by merchants were accounted for by three main commodity areas: coated two-sided stock, uncoated book papers, and reproductive papers. In 1985, "free sheet, coated 2-sided" paper constituted 22.8% of the total sales volume, followed by "uncoated book stock" (in rolls, sheets, cut sizes) at 22.6%, "reproductive grades" (bond and writing papers, mimeograph, duplicating) with 15.6%, and "groundwood, coated 2–side" at 12.6%. These percentages have not changed appreciably since 1982, although shares for free sheet coated 2-sided and reproductive grades have fallen about 1.5% each.

By 1985, fully 71% of total sales were to printers (28.4%–web fed, 31.3%–sheet fed, 11.5% in-plant printers). This is compared to 67% back in 1982. This is, by far, the most important end-user customer class for printing paper merchants. Quick copy shops, business forms manufacturers, book publishers, and government agencies each accounted for an additional 5–6% of sales.

Structure of the Industry

The Census Bureau reported that in 1982 there were 1,075 printing paper merchant firms in existence, operating 1,519 "locations" (warehouses) nationwide. Sales volume per location averaged $6.1 million. By company size, 781 (or 72.6% of the total) companies generated sales under $2.5 million. 178 companies (16.6% of the total number) were in the $2.5–25 million range and 61 firms were in the $25–100+ million size (5.7% of total). By size of "location" the overwhelming majority are small–940 locations (or 62% of the total) had fewer than 15 employees. 248 (or 16%) had 20–49 employees and only 35 (or 2.3%) had 100 or more workers.

As for market share, the business can be characterized as competitive. The four largest firms captured 29% of total sales, the top eight–42% (cumulative), the top 20–60%, and the top 50 firms–76%.

By region, the northeast/mid-Atlantic, midwest, and west coast account for the lion's share of activity. New York merchants alone constituted $2.5 billion or almost 27% of sales in 1982, followed by California with $1 billion and 10.8%.

Illinois generated $768 million, Ohio $499 million, Pennsylvania $432 million and Texas $423 million New York, California, Illinois and Texas together represented 543 of the total 1,519 warehouse locations as well.

The three largest metro/city areas were New York City at $2.37 billion in 1982, Los Angeles-Long Beach at $629 million, and Chicago at $569 million (estimated). No metro area sales data is collected via NPTA's PAR survey, but from the monthly sales report, sales through October 1986 are up 10% in the New York area, 9.8% in Chicago and 3.4% in Los Angeles. Based on the estimated total market size of $14.8 billion for 1986 and these cities' share of the national total in 1982, the New York market should be worth $3.77 billion this year. Los Angeles sales should be worth $1 billion and the Chicago market $904 million.

Historical Profitability and Inventory Turnover

There is no question that, due to the strong competition in the marketplace, gross profit margins have narrowed in the 1980's. Warehouse gross margins (as % warehouse sales) stood at 22.7% for printing paper merchants by year-end 1985 (versus 24.5% in 1980). Indirect gross margin was 17.3% (versus 17.7%) and direct gross margins were 6.6% (versus 7.5% in 1980). After rebounding in 1984, in-

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Personnel productivity has been good. Net sales per employee rose an average of 8% yearly from 1980–1985.

ventory turnover rates slipped to a slower rate of 4.33 times per year in 1985 (versus 5.13 times back in 1980).

The chief reason for the narrowing of profit margins lies with increased operating costs and "non-people" expenses. Operating expenses relative to gross margins were 83.5% in 1985 compared to 78.9% in 1980. Non-people expenses relative to gross margins rose from 25.8% in 1980 to 29% by 1985. EDP expenses have risen as more merchants computerized their operations or upgraded their systems with changing technology. EDP expenses, the cost of money and financing, inventory carrying costs, employee fringe benefits (especially escalating medical and liability insurance premiums) have all contributed.

Personnel productivity has been good. Net sales per employee rose an average of 8% yearly from 1980–85, reaching $461,000 last year. Gross margin per employee rose 6.1% yearly over the same period, to nearly $67,000 by 1985. Sales service and selling expenses combined accounted for about 36% of gross margins in 1985, about the same as in 1980.

Printing Paper Sales, Profitability and Operating Performance During 1986

NPTA has two excellent barometers to measure current performance of printing paper merchants throughout the year, in between annual PAR financial surveys. These are the: *Paper Merchant Sales Report* (monthly) and the *Quarterly Business Conditions Report* (QBCR)-(every three months).

At the deadline for this issue of *MN*, QBCR data for the first three quarters of 1986 (Jan. 1–Sept. 30) was available. Based on sales volume represented by participants through September 30, annual printing paper sales of $5.4 billion are represented for the entire year.

Following is a summary of performance, by key area:

Sales Growth: The U.S. average from the QBCR survey was a 6.0% increase. NPTA region 2 (mid-Atlantic states) did better at +8.7%, as did region 9 (Pacific Northwest) at +8.0%. Region 7 (Southwest "oil patch" states) fared the poorest, with sales dropping by 0.2%.

Gross Trading Margins/Profits: The U.S. average warehouse gross trading margin was 22.2%. Most regions were closely clustered in this range but region 9 firms did better at 24.4%. Indirect gross trading margins averaged 18.6% nationwide, but region 1 merchants (Northeast) were higher at 21.4%. Direct gross trading margins averaged 6.4% nationwide, but region 3 firms (Southeast) averaged 8.3%. Pre-tax profits as a percent of net sales were running at 1.2% for printing paper merchants nationwide, but region 3 firms did much better with 2.8%.

Operating Expense Control: Total operating expenses as a percent of gross profits averaged 84.8% nationally. Not surprisingly (since the companies had the best warehouse gross trading margins), region 9 firms had the lowest operating expenses at 75.8% of gross profits. Conversely, region 7 firms (whose sales have been flat) had the highest expense ratio at 97.9%.

Inventory & Receivables Management: The national average inventory turnover rate was 5.1 times per year. However, regions 1 and 2 turned over stock faster at a 6.3 times rate. Receivables turnover (in days) stood at 42.5 nationwide, with region 4 (Ohio, Michigan, W. Virginia, Kentucky) companies doing a better job at 38.6 days.

Correlating these QBCR results to cumulative data from January 1–September 30 from the monthly NPTA sales report, the printing paper sales increase comes out exactly the same at +6.0%. Days of receivables outstanding at the end of September stood at 38 days, versus 44 days for September 1985, a noticeable improvement. The "calendar days cost of ending inventory" was 67 days, the same as in September 1985. Dividing this figure into 365 calendar days gives you a monthly inventory turnover rate of 5.4 times (compared to 5.0 times for QBCR results for January 1–September 30). So, all in all, quarterly business report results match up very closely to monthly sales report figures.

More information

For those wishing more information on NPTA statistical services, contact John S. LaRosa, director of research, at NPTA headquarters: 111 Great Neck Road, Great Neck, NY 11021 or call 516-829-3070.

The Sales Professional 1

A special section dedicated to those who sell or manage the sales function

Strathmore Issues Embossing Booklet

The latest promotion of the Strathmore Paper Company is entitled, *Strathmore Americana and the Art of Embossing.*

Six inserts in the booklet are on Strathmore Americana in colors from white to blue to demonstrate a variety of embossing procedures in enough detail to provide designers with basic guidelines. Comments David E. Rousse, marketing manager for the company, "The intent is to present to designers information that will help simplify an often intimidating process." Production notes include design, embossing and printing techniques for each insert, as well as a section on what to look for in a vendor.■

Tricks for Remembering Peoples' Names

One of the best ways to remember someone's name after being introduced is to use what Bob Montgomery calls the *ACE* system, as described in his article *Your Memory A Source of Sales Power.* ACE stands for "action, color and exaggeration."

If you build ACE into your name associations, Montgomery reports, you will be able to recall the person's name quickly. For example: "Lola Bishop is a woman in New York," he writes. "I picture her as a lady bishop wearing a miter and giving a blessing. I'm in the congregation as the collection plate is passed, and it occurs to me that 'whatever Lola wants, Lola gets.'"

All associations may not be that moving or involved. Meeting Ray Angel, Montgomery says, gave him the picture of a man with wings with a ray of light striking his head, like a halo. It may take a little practice, but the ACE system may work for you.

Try it with your own name. Any images come to mind?■

Hammermill's New Grade for Lasers

Specifically designed for premium publishing on laser printers, Hammermill Papers Group introduces the Hammermill Laser Print. The new grade is said to be extremely smooth with high brightness and outstanding opacity, and is available in 8 1/2" × 11", white, substance 24.

Market manager of reprographics Jeff Idzik says, "Premium publishing, which is copying at its finest, is a new, fast-growing application for laser printers" which are used to produce large quantities of "premium quality copies." For samples or additional information, contact your local Hammermill merchant, or write to Hammermill Papers Group, Erie, PA 16533.■

The Art of Presenting Your Business Card

Your business card is your personal billboard at arm's length, states Jonathan Evetts in *Personal Selling Power* magazine. There is a protocol that surrounds its use.

Think of the card, he says, as an item of value and then wait for the right moment to present it. There is often a natural pause in the conversation with a potential customer, maybe when first asked to sit down, when the time is right to make your presentation.

Look the customer in the eye and, as you present your card to him, repeat your name clearly. This will link your name, face and company name in the customer's mind. If you are not offered a card in return, ask for one. The reason, says Evetts, is to give you more control of the discussion. (The customer is beginning to comply with you.) Build on this small advantage.

Also, don't be embarrassed if the other party doesn't have a card. Stress how important correct names and titles are to you and write it down. It will show how detail-minded you are.■

Xerox Sells Smart

The amazing growth of Xerox Corporation—from $2 million 25 years ago to today's $5–billion giant—is due to its sales ability, states Joseph E. Westfield, former sales manager and guest trainer for the company. Last November, at a luncheon meeting for the Sales Association of the Graphic Arts (SAGA), he spoke about *The Basics of Succcessful Selling.*

As background for his talk, he said that 14,000 successful sales people were interviewed by an outside research organization and, after further analysis, a three-day professional selling skills course resulted. Xerox formed a separate division for it and sold it to companies like IBM and Eastman Kodak; over 100,000 sales people have taken the course.

Following is a summary of the course's selling steps which are said to have led to Xerox's demonstrated success.

- *Closing is First.* After making the presentation and explaining the product's benefits, the sales person should ask for an order. There is a psychological plus if he believes he has the order and it also promotes a positive attitude on the part of the buyer.
- *Ask Again.* If the prospect is not ready to give the order, the sales person should restate the benefits of the product, pointing out what has already been agreed upon. "Again ask for the order," advised Westfield. 90% of new reps fail to do this. "Keep asking during the sales effort—politely, but persistently."
- *Style and Technique.* These vary with the sales person and each can use what he finds most effective.
- *Proving Step.* When a prospect indicates that a benefit is important to him but he is still skeptical that the particular product will provide it, the sales person must restate the benefit, prove and expand on it.
- *Support.* This may be 90% of the sales effort. "Don't back the client into a corner with a lot of technical explanations," cautioned the speaker. "Prove only what is necessary. Get the client to offer agreement, make him feel that he is an expert."
- *Probe.* Probe to find out why the call did not result in a closing. "Non-directive questions" (i.e., "What type of printing do you do?") give the client an opportunity to "discuss what *he* considers important. Ask directive questions (i.e., 'Do you do four-color printing?') to show what *you* believe is important."
- *Handling Objections.* Restate the objection in the form of a question to find out if the prospect really means what he seems to have said and to see whether you are both talking about the same thing. Then answer objections directly, minimizing them by stressing relevant benefits of the product. Westfield strongly recommends that everyone buy and read Dale Carnegie's book, *How to Win Friends and Influence People,* still "a most valuable selling guide."
- *Rapport.* Pictures and objects on the wall and desk give clues as to the buyer's interests. They are conversation pieces. However, said the speaker, "... generally, the best conversationalist is the best listener."
- *Don't knock the competitor.* Instead, emphasize the superior qualities of your own firm and how it differs from the competition in benefits provided.

A review of the selling principles learned during the selling skills course is contained in pocket-size guides. The sales person can use them before or after a sales call to analyze what should be done and what was actually done.■

New Labeling Aids Groveton Products

Intended to help both retail customers as well as warehouse stock pickers, the Groveton Division of James River Corporation has designed new labels for their Business Papers line. The labels will be used on every ream, box or carton and will have an eye-catching broad color band indicating the grade of paper in the package.

Each label will also have a symbol of a sheet of paper or an envelope that will indicate the color of the contents. Large catalog numbers on the package assists in picking the right product.

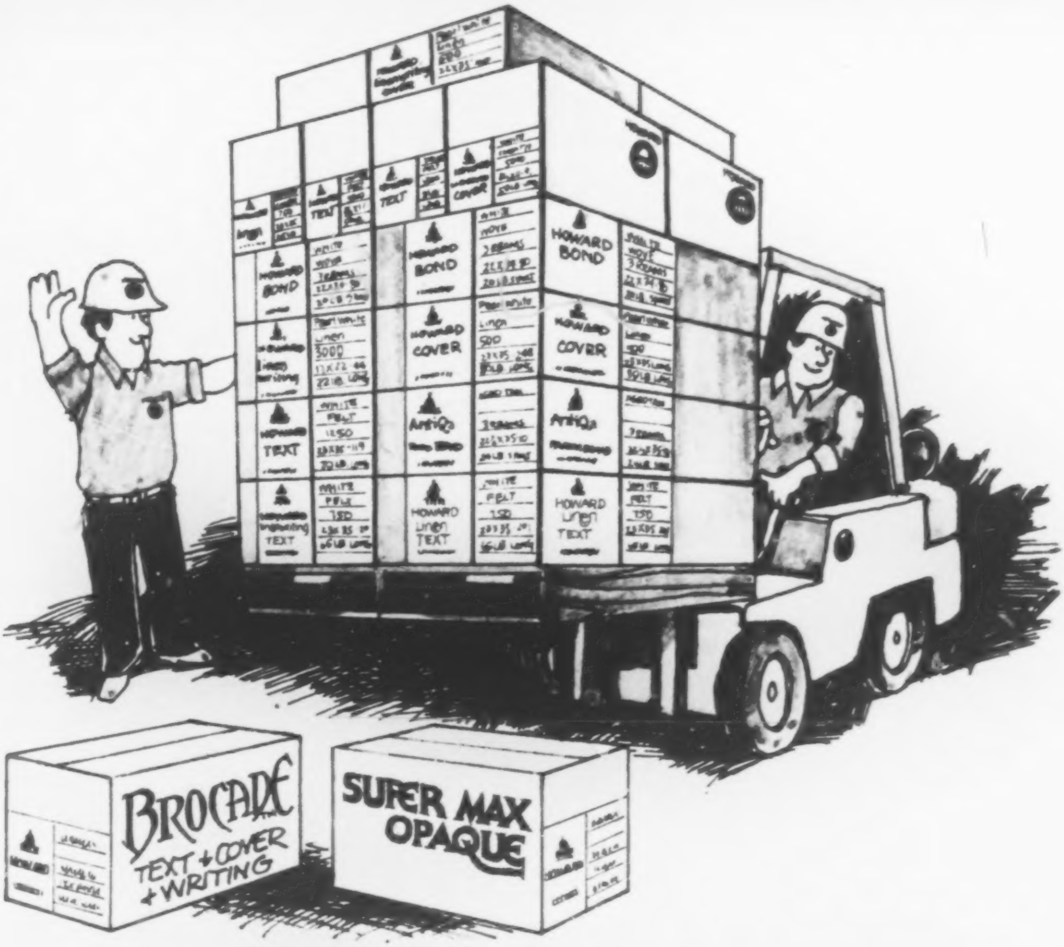
At the same time, James River Corporation has introduced a new line of paper for use in high-speed xerographic copiers. Called Whitefield®, the new paper features a 25% cotton formula.■

Test Your Paper Knowledge: How Many of These Paper Terms Can You Define?

Match the term with its definition

__ 1. Sulphate Process	A. A wire cylinder used to add a finish or watermark to paper
__ 2. Sizing	B. Pulp and paper comprised of fibrous bundles
__ 3. Groundwood	C. Apparatus used to dispense the pulp in the papermaking process
__ 4. Kraft Paper	D. Fabric belt that conveys the web through the papermaking process
__ 5. Dandy Roll	E. Method for preparing chemical pulp to make paper
__ 6. Slime Hole	F. Direction in which most fibers are aligned in a sheet of paper
__ 7. Rag Paper	G. Treatment of paper that adds to its permanence
__ 8. Felt	H. Paper defect caused by the growth of micro-organisms at the wet end of the paper machine
__ 9. Head Box	I. Unbleached product of the sulphate process
__ 10. Grain	J. Paper made with cotton fibers

ANSWERS: 1. E; 2. G; 3. B; 4. I; 5. A; 6. H; 7. J; 8. D; 9. C; 10. F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Getting the Most Out of Telemarketing

An expert in every phase of selling, Dottie Walters is said to be a leading force in increasing sales thoughout the United States. Her *Self Improvement Tip*, which includes 10 points, recently appeared in *Personal Selling Power* and are presented here.

1. *Make "Service Calls"* on clients you have worked for. Ask about their plans, needs, future expansion. Ask for referrals. Tell them about your new products and subjects. Ask, "How can I be of service?" Be flexible and ready to do new things to assist your clients. Work laterally to prospects in the same businesses.

2. *Write up a script and put it in front of your phone.* Ask customers about their needs *first*, then tell them how you can help them. Do not start by telling them how wonderful you are. To be interesting, be *interested*. Ask for the order three times.

3. *Make an easy-to-use form to fill out* as they give you information, so that you can just check boxes and write as few words as possible. Note anything they say so that you can refer to it again when you call back.

4. *Visualize their faces as you speak to them.* Smile. It makes your voice more pleasant. Put up a mirror so that you can see yourself as you phone. Frowning and scowling make you ugly. Smile into the phone; it is a personality projector.

5. *If your party is not in*, get information as to the best time to call back. Sort your cards by time zones and time-ins.

6. *Trained telemarketing people* (according to the L.A. *Business Journal*) can make 17 calls per hour and reach three decision-makers. Sales odds are one sale for four decision-makers.

7. *Be sure to put your MCI, Sprint* or similar service into your automatic dialer. Saves countless hours of time on long distance calls.

8. *Follow up EVERY call with a post card.* Have your picture printed on it. "How are you, Jim? Have a new idea for you. Will try to reach you by phone again on ...," or, "Thank you for the order," or, "Thank you for the referral," etc.

9. *Set a goal of numbers dialed and decision-makers reached.* In teaching sales, I show sales people how to prepare prospect cards, how to make notes on them as to what we might offer. Then we sort them by *best time of day to call.* You can dial 50 numbers per hour. This means a powerful energetic determination to reach 50 prospects. We sell one in five, of those we reach, in our field.

10. *Remember, never get mad,* even when prospects treat you with disrespect. Maybe they are having problems. My personal experience is that the worse they treat me the faster I can expect them to be replaced. What a triumph to go back and work out a wonderful contract with his or her successor!■

Operating Ratio Study for Quick Printing Industry Available

The National Association of Quick Printers and Quick Printing Magazine have published the *NAQP Operating Ratio Study*. Based on the operating experiences of about 200 companies, much of the study's value lies in the Executive Summary written by Larry Hunt.

According to the Study, average sales for all quick printing firms was approximately $450,000 in 1985, representing an increase of almost 34% from industry sales data compiled two years earlier, with inflation accounting for one-third of that growth. Copying experienced a 35% annual growth rate, while "regular printing" grew at just 10% a year. Despite the sales increase, net owner's compensation during the same two-year period increased only $5,400 to $65,500. This represented a 3.3% decline in owner's compensation, partly as the result of increased overhead (as a percentage of sales) due to the high cost of today's high-speed copy machines. Among other averages supplied by the study are payroll, sales per square foot and sales per employee.

The *NAQP Operating Ratio Study* can be obtained by non-members of the Association by sending a check for $25 to the National Association of Quick Printers, 111 East Wacker Drive, Suite 600, Chicago, IL 60601.■

Mats and Matting Sales: Know the Dirty Facts

According to ISSA today, it would be wise to let customers know that:

- 70–80% of all dust, grime and dirt in public buildings is tracked in from outside and spread throughout the floors.
- Tracked in dirt can permanently scar hardwood floors and resilient tiles, while oil and grime can be tracked into carpet and become permanent stains.
- One square yard of commercial grade carpeting can accumulate one pound of dirt over a one week period, and up to twice as much during inclement weather.
- The cost of removing a single pound of dirt from a modern building today, will run in excess of $500. Of that cost, equipment and supplies take from 5% to 10%. The balance, 90% to 95% goes for labor to get the job done.

Mats and matting products are the most cost effective method of controlling this incoming dirt. There are numerous types and categories of these mats and floor safety products, many of which have been displayed at NPTA's 1986 Paper/Plastics and Allied Products Exposition.

According to a recent study by *Sanitary Maintenance* magazine, matting goods accounted for over $206,632,000 in sales in 1985 and were sold to the following customers:

- Industrial
- Commercial
- Educational
- Governmental
- Medical
- Contract Cleaners
- Hotels/Motels
- Restaurant/Clubs
- Religious Markets
- Other

NPTA members have reported significant success in the sale of these products.■

Supporting Statements Support Close

If you agree that the climax of a sales call is a successful close, then you must also agree that everything you do during that sales call, leads to that successful close. That is why the skill of listening and supporting is so important. When a need is uncovered, you should support it. The other alternative is to disagree with your customer's need. When you can get your customer to say, "My sales person understands me," or "It's a real pleasure to have my sales person listen to me instead of trying to sell me," or "My sales person agrees with my problems and then solves them for me," you are doing a good job of supporting.

Any time you agree or make support statements to your customer, you show that you consider your customer's needs, opinions and feelings to be very important. Your support statements constantly reinforce the idea that you are there to help your customer solve problems. Last but not least, your support statements show your customer why your product or service is needed.

It does not matter if you've been selling a customer for many years, or if you've met him for the first time. It is smart business strategy to agree and support his needs. GOOD SELLING!

David B. Brizius, Copco Papers, Inc. Columbus, OH. ■

Sales Briefs

CROWN ZELLERBACH named Gregory Stone the Southwest regional sales representative for the company's Merchant Sales Group. Based in Fullerton, CA, the Group markets business papers, including roll offset and cut size electronic imaging papers in 13 Western states.

CARROLL COMPANY is offering two new cleaners. The Oven and Griddle Cleaner dissolves baked-on grease, food particles and soot in ovens, around griddles and broilers and, the company says, gives pots and pans a "like-new hue." The Coronado Disinfectant Cleanser is designed for cleaning and disinfecting hard, non-porous surfaces for use in hospitals and other institutions.

GILBERT PAPER introduces Gilbert® Ink-Jet, a premium correspondence paper specially formulated for ink-jet printers. In its drive for the expanding electronic printing market, particularly the bubble-jet technology, Gilbert's new product is said to offer an important benefit through its ability to be commercially preprinted—letterheads, forms—and then used with the ink-jet technology.

GUMMED PAPERS OF AMERICA's new sales manager is Russell D. Maki, formerly its southwestern regional manager. The company is a national specialty distributor of gummed and pressure sensitive label papers for Fasson, Brownbridge, Wausau and other companies. GPA has offices and warehouses in five major cities around the country.

CARTER RICE/NEW ENGLAND appointed Thomas S. Monahan, Jr., vice president. He will also continue as the company's sales manager of Fine Papers. David Miller is another new vice president of the company, and he too will continue his current responsibilities as manager of industrial sales.

FREEMAN PAPER COMPANY named Jay Kolwicz of Jaydel, Inc., in Cleveland, as their Salesman of the Year. A trophy was awarded by Freeman's president Larry Swanson and by Ray Nitschke, Pro Football Hall of Famer, at the recent NPTA Boston Convention.

SCOTT PAPER COMPANY offers EconoMizer® cloth-replacement wipers by the carton in a new display unit designed to attract customers' attention. The display holds three cases of the wipers which, the company states, provide adequate strength and absorbency for nearly any task, yet soft enough for personal use as well.

GEORGIA-PACIFIC's Printing Paper Division offers a booklet, "Going Coatless," to demonstrate cover and text papers from Hopper®. Recommended for annual reports, GCR, PCR, ICR and Achromatic scanning are all names for the process by which the weakest primary is subtracted and replaced with black. The result is said to be striking imagery with exceptional sharpness of detail on their uncoated papers.

NATIONAL TELEMARKETING survey reports that business-to-business telemarketing will grow nearly 40% in 1986. Telemarketing, which lowers the average cost-per-selling-call, has a greater potential than most companies are able to tap. The reason, reports Robert J. Freedman, vice president of Towers, Perrin—an international management and compensation consulting firm, is that most sales organizations are structured for outside sales. The organization gets in its own way.

THACKER CONTAINER announced some major additions to its packaging line as featured in their latest "Black Catalog." The company reports that they are the nation's largest supplier of stock packaging products to distributors. Contact them in Los Angeles, San Francisco, Dallas, Phoenix or Salt Lake City.

SEALED AIR CORPORATION'S Jeffrey L. Gardner has been promoted to regional sales manager for the company's Packaging Products Division's Central region.

CARROLL CHEMICALS has introduced a new bowl cleaner named "Quick Change" that they say is powerful yet has a pleasant odor.

PLASTICS INC. has added a second hot beverage cup to its popular Prestige line. It is a stackable 4-ounce demitasse with the same fluted lines that identify the Prestige collection.

WHITAKER CARPENTER Paper Company, Elk Grove Village, Il, announced that Virginia George has joined the company as their Svecia Antiqua Rare Paper consultant. ■

Non-traditional Sources Gaining as Business Paper Suppliers

Two surveys done in 1986 have indicated that end users have been turning more and more to such sources as catalog houses and telemarketing channels for their business paper needs. CAP International reports that their first survey, done in January, 1986, showed that 39.2% of the respondents bought their products from paper merchants and 8.8% indicated the "Other" category. By July, 1986, when the second survey was conducted, the number indicating purchases from paper merchants or other traditional sources, such as copier manufacturers, had declined to 33.4%, while "Other" had increased to 13.5%.

Charles E. Case, director of CAP International's Hard Copy Supplies Market Requirement Services warns that "it is critical for companies involved in selling business paper to take note of this change, anticipate its impact, and alter selling strategies *before* profit margins slow down."

The reason for the change, according to Case, is in new and emerging technologies which sees more and more people using personal computers in their offices. While this creates a new market for business paper, it is also changing the customer base and the buying source.

In order to help paper merchants recognize the risks associated with the changing market—and to tap into the opportunities—paper merchants need to be aware of and understand the markets and technologies involved. CAP will be holding its Second Annual Hard Copy Supplies Conference in Miami on March 2–4, 1987 to bring paper merchants up-to-date, including hearing from people in the industry who have already begun planning for the future.

For more information, or register for the conference, call Jean O'Toole at CAP International, Inc., One Snow Road, Marshfield, MA 02050, telephone (617) 837-1341. ■

Gilbert Addresses PC Publishing Needs

Whether a desk-top publishing system uses a laser, ink jet, resistive thermal or other type of printer, for best results the type of paper used is of prime importance to the quality of the output.

Gilbert Paper of Menasha, WI, a Mead company, has developed two new papers called Neu-Tech™, one with a 25% cotton content and one with a 100% cotton content which the company claims is ideal for electronic printing systems.

To spread the word, Gilbert has produced a brochure targeted at designers (rather than purchasing agents). Four-color illustrations explain how the various types of electronic printers work, followed by the specifications of the Neu-Tech™ papers, both of which are available in three colors and two weights. ■

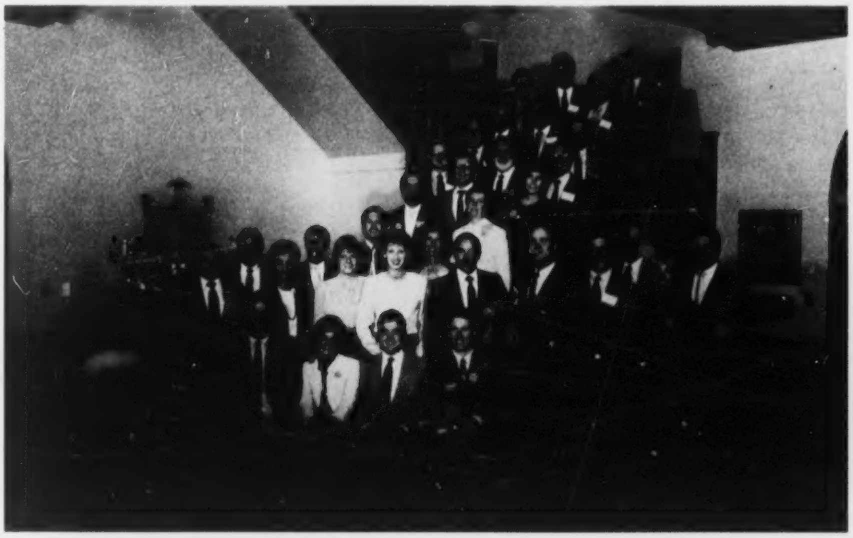
Sales Compensation

NPTA offers reports on "Sales Compensation" for both printing and industrial. For more information contact NPTA, Communications Department, 111 Great Neck Road, Great Neck, NY. ■

Emily Emphasizes Time Etiquette

According to *Emily Post's Etiquette*, 14th ed., by Elizabeth L. Post, if you have arrived on time for a business appointment and have been kept waiting, allow yourself 20 minutes before you start asking how much longer the wait might be.

On the other hand, if you are expecting a caller you should always have coffee or tea available, apologize personally if you have to keep the person waiting, inform telephone callers that you are with someone as soon as you get on the line, and, to keep control of your time, arrange for your secretary to come in with a reminder about your tight schedule at a previously decided upon time to end the appointment. ■



The Beckett Paper Company held its seventh Merchant Sales Conference, October 13–15, 1986, at The Marcum Center at Miami University, Oxford, Ohio. The 28 Beckett Merchant Representatives studied detailed information about Beckett's grades of papers and also discussed time management, professional selling techniques, and other relevant topics. The next Beckett Merchant Sales Conference will be held March 18–20, 1987.

How a new program from International Paper will help you give printers better service

Announcing the Springhill® Custom Roll Offset Stocking Program at Mobile.

Now you won't have to wait until the next mill run at Mobile to get popular size rolls of Springhill® Offset. With International Paper's new Custom Roll Offset Stocking Program at Mobile, the mill will be carrying significant inventories.

You can get quicker delivery, give your printing customers better service, and have more buying flexibility, too, because you can:

- Order 50 and 60 lb. Springhill® Offset rolls in widths ranging from 11 inches to 35 inches.
- Mix shipments of offset rolls with reprographic paper, colors, offset skids and cartons, and return postcard stock.
- Have your order shipped within 48 hours from available stock.

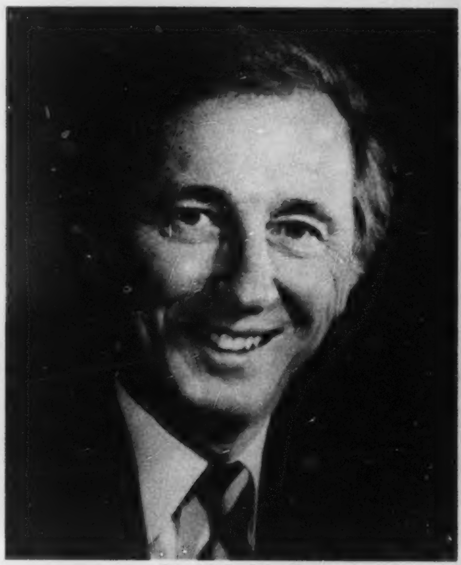
For more information about Custom Roll Offset at Mobile, Ticonderoga, or Louisiana, call IP Customer Service at 1-800-IP CAN DO. Or write: International Paper Company, White Papers Group, Room 31-16, 77 West 45 Street, New York, NY 10036.

The Custom Roll Offset Program at Mobile. Another way we're working to make IP the easiest mill to do business with.

International
Paper
Company

Printing Paper: A Changing Commodity

The manufacture, distribution and use of printing papers is in a state of flux. It is a commodity that continues to respond to the whims of the marketplace in a way that few understand. The following observations of how printing paper is changing should be reviewed carefully by merchants and printers alike.



David S. Dimling

Uncoated Papers

by David S. Dimling, vice president
Georgia-Pacific Corporation

Today's commercial printer is routinely asked to and consistently does produce a product of higher quality than he was expected to produce as little as five years ago. Computers have substantially increased press accuracy and operator control, allowing faster running speeds and improved results. While such improvements have made for a better end result, they have put new stresses and demands on the paper.

More sophisticated printing and converting equipment require a more sophisticated sheet of paper, a sheet with consistent runability and printability, one capable of consistent quality performance. The major manufacturers of uncoated papers have invested huge sums in upgrading existing equipment and in making sure that the new machines being installed are equipped with state-of-the-art measuring devices and process controls. Perhaps nowhere are the results more obvious than in office reprographic and commodity offset papers, both areas requiring high speed, high performance papers.

Many uncoated mills are installing top wire formers to improve formation and help insure more consistent print quality side-to-side. New computer-driven color systems are being installed, allowing the machine to self-adjust for the entire color spectrum, improving color consistency throughout the run and from run-to-run. New process control systems, measuring moisture, caliper, basis weight, opacity and brightness, enable the paper machine to take constant measurements and make necessary adjustments during the manufacturing process.

This closed loop computer control of the paper machine helps to keep the paper as uniformly close to target specifications as possible. Additionally, new calendering systems continue to improve caliper profile, producing a more level sheet and a more uniform printing surface. Converting equipment has also received significant attention; increasing use of precision sheeters improves dimensional accuracy and squareness of the sheet. This, in turn, enables the printer to better control registration.

Paper mills are installing such state-of-the-art equipment because they recognize that improved technologies and more sophisticated printing and converting equipment demand similar improvements and sophistication in the manufacture of uncoated papers. And along with increased demand for higher quality uncoated paper, the demand for greater quantities continues to grow.

Current prospects are for steady but modest growth in total demand over the next few years. However, it is anticipated that the smallest increase in demand will be focused in the coated area and that the greatest strength will be felt by papers used for information processing and documentation. Current momentum in the use of information processing systems is expected to remain strong and thus uncoated free-sheet requirements will continue to rise. In fact, consumption of uncoated free-sheet grades is anticipated to grow at 4-5% in 1987 and at a slightly higher rate in 1988.

As the requirement for consistent high quality uncoated papers continues to grow, mills will continue in their efforts to anticipate technological developments in printing and converting equipment, so that they can keep pace with the demands being placed on their products. As they increase capacity, manufacturers will continue to strive for excellence, will continue to upgrade and improve their product lines and will be marketing papers even better suited to their customers' end uses. Printers and converters will be the beneficiaries, as improved papers mean better and more consistent runability and printability.

Coated Papers

"There is more paper on the market than can possibly be used," reports *Folio* magazine in their December, 1986 story "The New Paper Market." Author Irving Herschbein is talking specifically about the coated groundwood grades used by magazine publishers.

Supply and demand for these products are evidently out of balance. It was not so long ago that magazine papers were on allocation. A strong marketplace fueled demand, mills worked to add new supply and foreign paper filled some of the gap. Today, the market has slowed and the new capacity that has come online has created the current oversupply.

Herschbein reports that advertising pages are flat among magazines, with the top 100 titles only able to squeeze out a 2.7% increase. This is compounded by a softness in circulation numbers in general. But the paper business, responding to the marketplace, becomes cyclical. Herschbein says that by "1989 or 1990 the market will tighten up again and several people will start new machines working."

Should you plan for a coated paper shortage? David Saltman says everyone should "plan for the unexpected." He writes in the December issue of *Magazine Design & Production* that in an emergency, one must substitute grades, seek other sources of supply or even "borrow paper from a friend."

The best way to avoid problems during times of tight supply, reports the National Paper Trade Association, is for buyers and sellers to have a good working relationship at all times.

U.S. paper mill coated capacity projections, according to the American Paper Institute, are expected to rise 10.2% for coated groundwood (1986-88) and 15.1% for coated free sheet during the same period. This situation, plus the loss in the value of the dollar, has squeezed the foreign coated paper suppliers from the marketplace. All but the well-established are having difficulty.

Cover and Text

According to the American Paper Institute, the best new information on these special printing papers may be found in their *Cover & Text Book*. The uniqueness of the book for both printers and paper people lies in its ability to demonstrate how a variety of graphic arts techniques look on different cover and text papers.

This grade category has grown in its application to many end products. Although it represents only about 3% of the total amount of paper produced in the United States, merchants throughout the country have over 6% of their sales in this area reports the National Paper Trade Association. It continues to be an important part of the merchant business.

Synthetic Papers

Are synthetic papers for printing really paper? It depends how one defines "paper." Synthetic papers are *not* made from cellulose fibers. They are created from polyethylene or polypropylene—plastic resins.

Interestingly, these printing substrates have been around longer than most people realize. Kimdura, made by Kimberly-Clark, has been on the U.S. market since 1974.

The niche that Kimdura and Tyvek, DuPont's synthetic paper, have in the market is based on its durability, moisture resistance and strength. Printing applications abound. DuPont reports that approximately 70% of their Tyvek output is used in printing.

A new application can be found in the copier market. Non-Tear Sheets, produced by Avery Consumer Products, and Never-Tear made by Xerox, are being targeted at users who want to insure the permanence of the final printed product. The polyester sheets are designed to work with the dry-toner technology as will as laser printers.

The real plus provided by the synthetics, experts say, is its uniformity of surface. It is extremely smooth and lends itself to a great variety of printing applications. The use of synthetic papers is growing and 1987 should see new entrants in this market.

Many uncoated mills are installing top wire formers to improve formation and help insure more consistent print quality side-to-side.

We're pulling out all the stops to support new Spectrum copier paper.

We're proud of our new Spectrum copier paper. And we're doing everything possible to help make it a big success. That's why we've scheduled advertisements in leading trade magazines. To top it off, we've also scheduled insertions in The Wall Street Journal.

What's more, we're not talking about just one or two advertisements. We'll be running a *consistent* schedule in all of these publications throughout 1987. Just take a look:

Publication	**Circulation**	**Number of Insertions**	**Potential Customer Exposures**
*Graphic Arts Monthly	16,000	6x	96,000
In-Plant Printer	35,125	6x	210,750
In-Plant Reproduction	39,300	6x	235,800
Instant Printer	25,811	4x	103,244
Modern Office Technology	156,027	6x	936,162
The Office	163,159	5x	815,795
Office Products Dealer	32,190	6x	193,140
Wall Street Journal	2,000,000	10x	20,000,000
Total	2,467,612	49x	22,590,891

*In-plant editions only

This media program is designed to reach people who *specify* copier paper, *influence* its specification, and *use* it. We're leaving no stone unturned in our effort to maximize *your* Spectrum profits.

For two years now, we've been telling you about Georgia-Pacific's *commitment* to paper. Now we're backing up this commitment with exciting new products and aggressive marketing programs.

Please see the facing page for a sample of the advertising that will be used to introduce new Spectrum copier paper.

Georgia-Pacific GP
Printing Paper Division
WE'RE COMMITTED TO PAPER

When we run Spectrum, the only reason we stop the copier is to reload.

SPECTRUM
DP
DUAL PURPOSE

That's consistent performance.

In our office the barrage of reports and memos never stops. We simply can't afford down time. That's why I rely on Spectrum copier paper. Every sheet of Spectrum is identical. The same size. The same quality finish on both sides. The same shade of white from package to package.

Spectrum delivers clean, crisp, trouble-free reproductions time after time, whether we're using our high-speed copiers or our most sophisticated printing presses.

Spectrum copier paper comes in Hi-Brite, Duplicator/Liquid Toner, Dual Purpose, and Mimeo. And is available in three sizes plus three hole punch. If your printing needs demand speedy shipment, Georgia-Pacific has designed an innovative inventory and stocking program that should make Spectrum available to you on a moment's notice.

Spectrum is a no-nonsense copier paper that takes the headaches out of duplicating. Thank you Georgia-Pacific.

Georgia-Pacific
Printing Paper Division
WE'RE COMMITTED TO PAPER

SPECTRUM DP™ SPECTRUM DP™ SPECTRUM DP™ SPECTRUM DP™

Printers and Their Paper Merchants

This article, authored by the National Association of Printers and Lithographers, serves an important purpose in this special issue of MN. It gives the reader one perspective of the mill-merchant-printer relationship. For all to work together more effectively, each must listen to and learn from the others—both in good times and in bad. The mutual success of all involved depends on it.

Management News invites response. Do your working relationships resemble those described in this article? What do you feel can be done to strengthen them? Direct your correspondance to the editor.

Louis J. Brand

Paper sales people have an interesting challenge . . . if a supplier is trying to find a preferential advantage for his company's paper stocks, he would be much better off dealing with the people in our creative and technical departments . . .

Paper, basic to every printing job, is a printer's most significant material cost. The ever-changing dynamics of paper running smoothly through a press causes more consternation than almost any other aspect of the job. When problems occur, printers want answers and turn back to their suppliers for the solution. Often that supplier is a paper merchant.

An overwhelming amount of printer's paper procurements run through merchant houses with merchants handling 60% of all paper produced for use in the U.S.

Printers, as a group, represent 81% of the average merchant's business. Nevertheless, this significant customer group often claims that merchants don't provide the services printers need most. Recently, a group of printers met for a roundtable at GraphExpo East to discuss how relations could be further improved.

Questions were drawn up jointly by the National Association of Printers and Lithographers (NAPL) and NPTA. The discussion was moderated by Jim Young, NAPL's director of communications. Rhona Bronson and Joe Andrukitas of NAPL's communications staff questioned the participants, who individually account for between $500,000 and $5 million in annual paper purchases. They included:

Louis Brand, president, The John Henry Co., Lansing, MI

Bill Banks, president, Rome Printing Co., Rome, GA

Lee Carpenter, chief executive, Fleming Companies, General Printing Division, Topeka, KS

David Horst, president, Science Press, Ephrata, PA

William Moore, president, Moore Lithograph, Portland, OR

NAPL: *How can merchants and printers work toward a more effective relationship?*

Banks: Paper merchants and their trade association can put on more seminars to enhance merchants' selling abilities. I feel that by having regular forms of communication, perhaps through seminars, merchants would be enhanced in the eyes of printers.

Our company, located 60 miles north of Atlanta, is in a somewhat remote part of the state and, consequently, we do not get the most up-to-date information concerning new products.

Because we are not in a major metropolitan area and not a large printer, we're not the first ones to get samples. However, when merchants do make a consistent effort to keep us abreast of new products, we will certainly reciprocate.

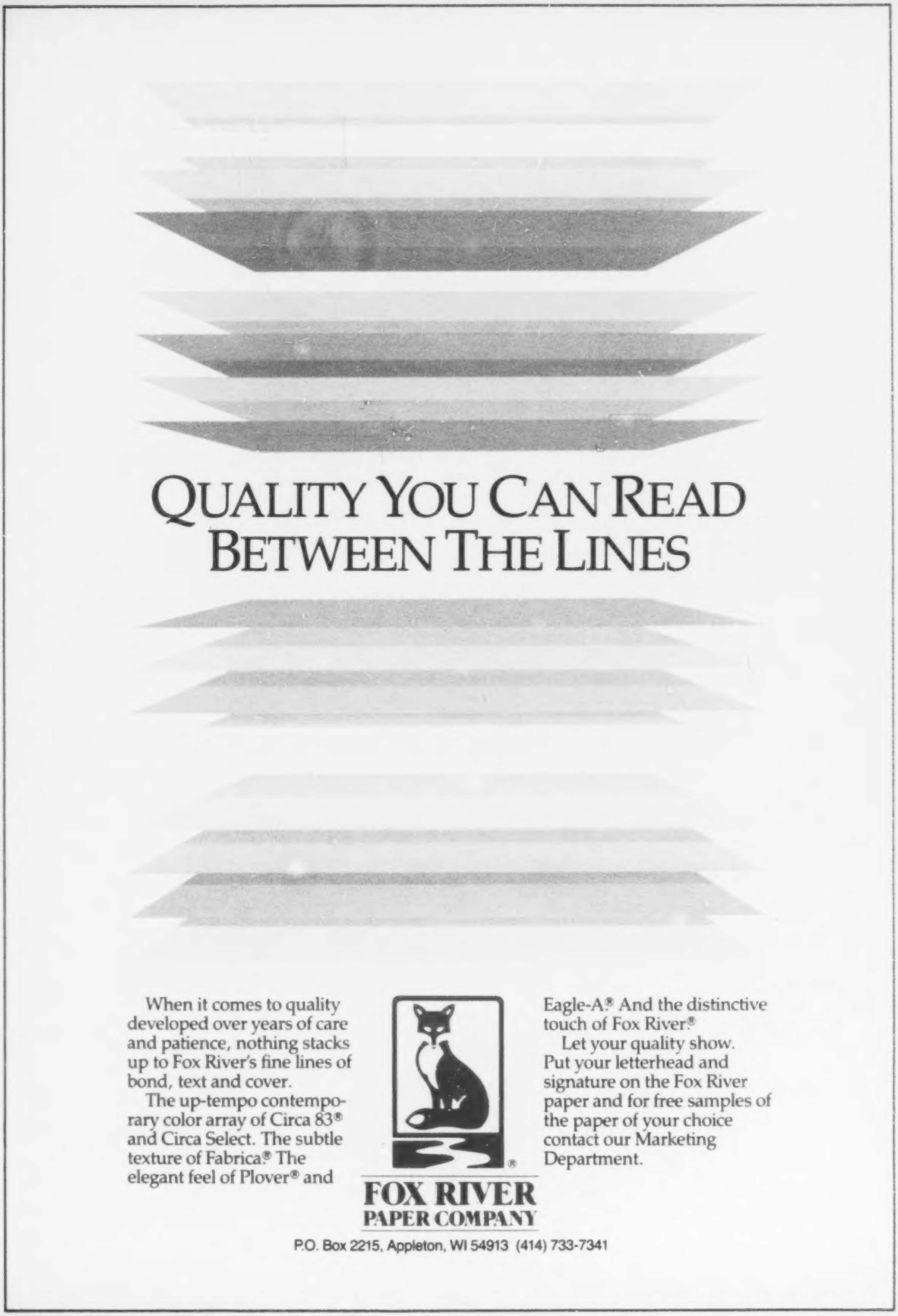
Brand: I think paper merchants would be more effective if they studied our companies more and found out what we do before they came in with recommendations. So many times, merchants' efforts are just shooting in the dark, rather than reacting to a specific need we might have. A suggestion might be that they send their sales people through NAPL's Executive Certification Program and learn a little bit about marketing from the printer's point of view.

Moore: Point well taken. I'd suggest that merchants look out for what their customers do, how they do it, where they do it, who they do it with and then service and sell to those accounts. We want them to understand that they are servicing us.

We don't buy ten skids of paper because we like the merchant. We buy because we have an account who wants us to print ten skids of paper.

In our location, an hour away from almost any delivery needed, we still need to be serviced. We want the sales person there at a regular time, either once or twice a week, depending on how much we buy and how much our volume is on a particular job.

We never want to see a sales rep come in empty handed. Bring some samples of the lat-



QUALITY YOU CAN READ BETWEEN THE LINES

When it comes to quality developed over years of care and patience, nothing stacks up to Fox River's fine lines of bond, text and cover.

The up-tempo contemporary color array of Circa 83® and Circa Select. The subtle texture of Fabrica® The elegant feel of Plover® and Eagle-A® And the distinctive touch of Fox River®

Let your quality show. Put your letterhead and signature on the Fox River paper and for free samples of the paper of your choice contact our Marketing Department.

FOX RIVER
PAPER COMPANY

P.O. Box 2215, Appleton, WI 54913 (414) 733-7341

Circa '83® Text, Arctic White, Sub. 80

Please send me more information and samples of the following Fox River Papers:

☐ Eagle-A
☐ Plover
☐ Fox River
☐ Circa '83
☐ Circa Select
☐ Fabrica

Please check the category that best describes your job/company:

☐ Design/Art Studio
☐ Advertising Agency
☐ Paper Merchant
☐ Printer
☐ In-house Agency
☐ Other ____________

NAME ____________
TITLE ____________
COMPANY ____________
STREET ADDRESS ____________
CITY ____________ STATE ______ ZIP ______

Fox River Paper Company
Marketing Department
P.O. Box 2215
Appleton, WI 54913

est merchandise in the field. Don't come in and say, "How are you? I was in the neighborhood." We get a lot of that, and it doesn't help us to acquire useful information.

Carpenter: In very simple terms, paper merchants do not market. They come and knock on the door and say, "What do you need this week?" That's basically what they do. No one comes in and says, "Do you have any problems and how can we solve them?" They don't market.

Most merchants don't know our business. The few that do, sell a whole lot more paper.

Brand: In all fairness, paper sales people have an interesting challenge here. We say they should become familiar with our operations, which means, in effect, that they should be talking to people outside of our purchasing departments. The simple fact is, if a supplier is trying to find a preferential advantage for his company's paper stocks, he would be much better off dealing with the people in our creative and technical departments who can determine why a particular stock might be good.

NAPL: *What are the deciding factors in continuing or dissolving an ongoing relationship with particular merchants?*

Carpenter: One of my pet peeves is pricing. We're in Topeka, 60 miles from Kansas City. We have merchants from Kansas City calling on us, as well as two merchants from Topeka. We have to watch every price, every minute, or they'll quote a price that is not a delivered price! When we actually order the paper we're told that it has to come from some other distribution center and will cost up to 7–8% more! I would like to see suppliers stop this practice.

Moore: There are two things that have always stuck in my craw with paper merchant relationships. One is the 24 hour hold that is renewable *ad infinitum* for some reason. The other is extended credit to price cutting printers.

If two printers are bidding a job that has to be done on special paper, both will put the paper order on hold. Then, if I get the order and my competitor doesn't, he still renews his hold. Everyone knows he didn't get the order, and yet the merchant renews the hold.

I'm also tired of financing the printer down the street who doesn't pay his bills. I discount my bills to the paper merchant, and he extends credit for 90–120 days to the competitor. I'm constantly losing orders to him because he cuts price on paper. In effect, the paper merchant finances them right into Chapter 11. Within a short amount of time, they're back in business, competing against us and cutting prices, while we're still discounting our paper bills.

Horst: The whole problem centers around two particular ideas—communication and customer service. We find a definite lack of consistent communication between our purchasing department and paper suppliers. The suppliers are not providing information on a timely basis, or it's inaccurate, or so nebulous that it's not helpful.

Our people are also finding that the merchants are slow in handling claims and fail to notify us about delivery delays. It's as though they walk in the door, sell us a product and then disappear.

In our end of the business, we're selling service. I think our suppliers should do the same.

NAPL: *Do you all agree that communications and customer service are the most important factors?*

Brand: They're important factors. A good paper merchant is no different than a good employer, customer, or anyone else. If they're straightforward and have an honest relationship, we're going to get along just fine. If they get tricky, we're not going to have anything more to do with them. It's as simple as that.

Moore: Service has to be number one because that's what we're selling to our customers. Here's a positive example from one paper house in Portland that others can learn something from.

This merchant stays open until seven or eight o'clock at night and has someone answering the night phone. This is an enormous help for printers who get an order at five o'clock and go on the press at seven.

Now, that's service. We pay them back by ordering through that particular house because their service is important to us.

NAPL: *How effectively do you think merchants represent the various mills? Are they simply order takers or do they sell the finer points of the mills?*

Horst: It depends on the person. There are some excellent sales people and some excellent order takers. The best possible world would

William Banks

Because we are not in a major metropolitan area and not a large printer, we're not the first ones to get samples. However, when merchants do make a consistent effort to keep us abreast of new products, we will certainly reciprocate.

William J. Moore

Service has to be number one because that's what we're selling to our customers. Here's a positive example . . . this merchant stays open until seven or eight o'clock at night and has someone answering the night phone. This is an enormous help for printers who get an order at five o'clock and go on the press at seven.

have one person with both characteristics.

Banks: In our situation with text papers, our merchants do a pretty good job of handling and providing information. My impression is that some of the sales representatives should have more knowledge concerning coding problems, particularly in technical areas, such as coverage and ghosting.

NAPL: *What about mill representatives? Are they helpful or do they just complicate the situation by way of their third party status?*

Moore: When a mill rep looks you in the eye and says, "A quarter inch trim is within mill tolerances," I don't believe the mills are being helpful.

We buy a million dollars worth of paper from 5–10 mills, but to each of them we're a very small drop in the bucket. So, we deal with the mills through our paper merchant.

Banks: My perception is that the only time you see the mill rep is when there's a problem. That's not good for establishing a positive relationship. However, there have been exceptions to this.

Brand: I agree. It's counter-productive when a mill rep only comes in for problems because, nine times out of ten, he says it's the press crew's fault, or the humidity, or the ink. According to him, it's never the paper stock.

By the time you reach a compromise or agreement, you've jumped through so many hoops that any possibility of good public relations has long since been betrayed. I don't mean to sound negative, but if a merchant or mill rep is going to settle a paper problem, I recommend it be settled fast so the printer can get on with the job.

Carpenter: Here's a typical scenario: We get a special job that develops a stock problem on press. We fight it through because of our customer's deadline.

Now, you get back to the merchant the next day and it takes an additional two days for the mill to react. The mill rep finally comes in and the first thing he says is,

"How come you didn't stop the job, or call me when the problem was happening? You just shouldn't have run the paper at all. We would have been glad to replace the paper at the time, but we can't tell from the trash anymore what the problem was." It's a defensive attitude.

He doesn't say, "What can we do to help you? Here's a number to call us next time so we can solve some of the problems on the phone."

The answer you need from your merchant is, "We'll go the extra mile with you."

Moore: You'll never understand how I feel when I see a mill rep, briefcase in hand, say, "Ink caused the blade mark on every fourth sheet." It isn't a likely scenario.

NAPL: *Do you actively try to discourage your customers from buying their own paper?*

Brand: We try to enlighten them on how advantageous it is for them to deal directly with us.

Moore: We'll take all of the responsibility for customer orders if they let us. That's a part of the service we were talking about.

Paper merchants should do the same thing, just as a trade bindery, if you use one, takes full responsibility.

NAPL: *If customers normally supply their own paper, do they tend to do so before even talking to their printers about the job?*

Moore: It's a case of "the spouse is always the last to know." Quite frequently, the printer is the last one to know there is a very important or complicated order coming up.

The customer will notify the designers, their accounting department—everyone. Then they'll put the job up for bids and give the printer three days to produce something they've been working on for five months! It's not at all uncommon.

Banks: The point should be made that early in the planning process, the printer can be a valuable consultant to the customer about what types of paper are needed.

NAPL: *Do any of you have problems with merchants delivering paper purchased by your customers?*

Horst: We get shipments with no markings or identification, and I'm not talking about small orders. The delivery isn't marked according to the publisher, customer, job number or anything. We supply all that information to the merchant, but suddenly, nevertheless, a mysterious truckload of paper with no markings arrives at our loading dock.

We have quite a few customers who supply their own paper and it multiplies our problems. If you have damaged stock or any other paper problem, you have to go through three or four different processes to get it rectified, and it's never rectified to anyone's satisfaction. We end up looking like the bad guys, because it's considered our fault if the job's late, even though the customer purchased the paper.

The only good thing that comes out of these situations is that several customers come back to us and say, "Would you please buy the paper?" They learned their lesson when they got burned too many times.

NAPL: *Is that a merchant's problem or a printer's problem?*

Brand: It's naive to think that the paper merchant is going to educate people on how to circumvent him by buying only through printers. There are so many paper people out there and the competition is tough.

As a printer, I am frustrated on occasion when merchants sell directly to my customers. Not only for the reason cited, but because when you let a creative person make the paper determination, you invariably invite trouble. Creative people don't generally have the technical understanding to realize what's going to happen when their "pretty" paper goes on press.

Take this hypothetical situation: A paper merchant sells stock to my customer. I have a problem on press and turn to the customer, who, in turn, defers to the paper merchant. The paper merchant takes the position that the stock is fine and it's a press problem. Now I'm right in the middle of the ruckus.

Carpenter: That's where some of my disagreements with merchants occur. If there is a problem, they don't try to solve it initially. They try to go around us, to the customer at times, hurting our customer relations that we've built. Of course, those are the people you stop dealing with.

Moore: It's kind of pathetic that we can't seem to develop a harmonious interrelationship between the customer, printer and supplier. It would make for the best possible job and be fair to all parties involved.

The reason we're talking here right now is because a harmonious relationship does not exist to the degree that it should.

I'd like to mention a particular Aesop Fable about a dog with a bone in his mouth. The dog looks down into a pool of water and sees a bone. He drops the one he has in his mouth to pick up the one in the water and loses everything! Sometimes, I think, paper merchants put themselves in a similar situation.

NAPL: *Do you have any recommendations?*

Banks: Regardless of who supplies the paper, the paper trade association or a mill should put out a manual defining the steps required to supply proper documentation of a complaint. We often hear, "You didn't supply such-and-such information, and, without it, we can't give you full credit on a couple of skids of paper."

If there were a standard procedure or instructions about what a printer's supposed to do when problems occur on press, then perhaps there would be a better understanding between printers and mill reps.

Moore: It's the first time I've heard of the concept, and it makes so much sense. The paper mills should give us specifications on the kind of information they want from us. Do they want tape pulls? How many? What size? How many sheets? What sequences do they want? Each mill probably has different requirements.

If each mill and paper house would furnish that information, it would be a help. I don't believe it's an invitation to trouble, but an invitation to cooperation.

Carpenter: We have to understand that with merchants, we're the ultimate buyer sooner or later. The printer has to be treated as a buyer even in the situations when customers do direct purchasing.

NAPL: *What new services would you like offered that are not part of your regular merchant service?*

Carpenter: I would like them to provide a packaged product that enables us to monitor both count and quality. We have problems receiving the paper correctly and in weighing. In most cases, we run off skids and the skid markers and tabs are never in the right places.

The way paper people account for paper makes our internal waste and receiving accountability much more difficult than it needs to be. The paper merchant ships by the pound, and the mill will only guarantee the paper to certain tolerances.

My conversion book says there should be

Lee Carpenter

> ***We have to understand that with merchants, we're the ultimate buyer sooner or later. The printer has to be treated as a buyer even in the situations when customers do direct purchasing.***

Quality Reporting/A Must for Merchants, Printers

The National Paper Trade Association, with the cooperation and support of the National Association of Printers and Lithographers, Printing Industries of America and the National Association of Printing Ink Manufacturers, created a "Quality Report" form designed to document problems in the printing process. (A camera-ready copy of the form may be found in the reference section of this magazine and is available for all to use.)

The purpose of the form is to gather information on the problem before the details are lost to time. The form has become a standard in the merchant community through its use, and many paper mills have accepted it in lieu of their own forms. Quality reporting is a necessary ingredient in problem resolution. Through the use of the form, all involved in a claim can be better informed and a settlement can be reached more quickly.

David Horst

We have quite a few customers who supply their own paper and it multiplies our problems . . . The only good thing that comes out . . . is that several customers come back to us and say, "Would you please buy the paper?"

150,000 pieces, but then, all of a sudden, we come up short. There's really only 140,000 and now I have real problems. When I complain, the paper merchant will say that the deficit is within tolerance because they're allowed 2–3% variance on paper. The result is that I just gave away 2–3% of my profit because the paper merchant was selling me in pounds and not sheets.

NAPL: *Does anyone else have problems with that?*

Brand: Sure, we all do, but I'm never quite sure whether the problem stems from difficult accounting or whether we should keep the inventory under lock and key. In all due respect, if you're experiencing an awful lot of shrink, it's difficult to pinpoint the source. I suspect a reasonable share of it is acquired by moonlight requisitions or to compensate for the fact that the pressman blew part of the job.

NAPL: *Has computerized inventory control on your site affected your purchasing habits?*

Horst: Very definitely. You can't inventory if you don't know what you've got. We run the gamut of almost every kind of paper stock and it's difficult to keep track of that much variety. We instituted a bar code system and were able to cut our inventory substantially and yet have enough on hand to meet customer demands. The system also helps us keep track of customers supplying their own paper, since we do charge for storage.

Carpenter: We're not on a computerized system, but we have someone dedicated to handling inventory. We found out it was worth the investment to have that one person keep our documentation up-to-date.

NAPL: *Finally, what are some important characteristics displayed by your current merchant that help sustain a positive relationship?*

Banks: There's one merchant in our area who is open almost 24 hours a day. It's a Godsend on occasion. I'm sure there are 400 printers in the Atlanta metropolitan area who are willing to pay for that service, and yet I'm only aware of that one merchant (out of four or five) who does it.

Brand: Here's another example of something that's worked our very well for us. An enterprising merchant came to us and said that if we could guarantee, on an annual basis, the purchase of a given amount of paper with certain characteristics, he would open a distribution warehouse in our immediate vicinity.

It was a very fine company, and we worked out an arrangement. We agreed to buy $5 million worth of a specific stock at a good discount price during the year. As a result, they located a warehouse 500–600 yards from our plant and deliver into our building immediately upon demand. It means we have a just-in-time arrangement with very little effort involved.

Another advantage is that it saves us space. If you have to take in a 50 skid order and hold onto it for a month, you've got a genuine problem. We're as crowded as most printers, so this arrangement lets someone else hold the inventory and deliver to us as we need it.

NAPL: *How long has this arrangement existed?*

Brand: A couple of years. The original idea worked out even better than we initially anticipated because we leased them a part of a warehouse we already owned. It's worked out to be good for both parties.

I must say it proved mildly traumatic to some of the competing paper houses. The arrangement literally took them out of consideration for that particular stock. On the other side of the coin, I've always been quite insistent not to cut off other good sources of supply. I check on this periodically and our tonnage to the other paper houses hasn't suffered in any way because of this arrangement.

I feel very strongly that printers and paper merchants are in this thing together and we should maintain just as good a relationship as we can. This distribution warehouse arrangement is just one example of what a paper house can do if they really want to get progressive.

NAPL: *Thank you very much, gentlemen.*

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Printech Week at RIT Develops Paper Representative Role

Understanding the nuances of the paper and ink relationship—the two variables that have significant impact on printed material—became a reality for 24 participants enrolled in the most recent Printech Week held October 27 through 31 at Rochester Institute of Technology. The 40-hour program was held at the Institute's Technical and Education Center of the Graphic Arts, and co-sponsored by NPTA.

The week-long workshop (the most successful in the program's three year history) gave printing paper sales people and their managers a solid background in graphic arts technology with plenty of hands-on press work. While Printech Week does not attempt to turn participants into printers, it does give them a better understanding of their customer's business.

Because paper is the biggest expense after capital investment for printers, they often look to the paper first when a problem arises. By learning what happens during the entire printing process, paper sales-people are better able to assess what is actually happening.

To gain that understanding, participants produced a printed brochure from the first thought to the finished product. In doing so, participants encountered all aspects of the offset printing process. The eight-page signature (with the participants' photograph on the cover) was taken through every step of development: mechanicals, typesetting, scanning, proofing, photographing, negative stripping, plate making, running of the press, assembling and binding.

The T&E Center purposely created problems on the press so Printech participants could experience actual problem-solving situations—problems with ink consistency, water balance, scumming and binding—all of which are often magnified by some paper characteristics.

From the very beginning, the importance of design to total reproduction was stressed: how heavy solids printed opposite halftones can create major problems, and how improperly calculated margins can result in bad bleeds, for example. Participants encountered the problems inherent in controlling four-color work while reproducing black and white at the same time. They also saw first-hand the difficulties special papers present printers.

These and other situations built into Printech Week addressed many of the problems confronting printers every day. With first-hand knowledge of what actually happens in printing, paper representatives become more effective as links between the designer and the printer.

Director of industry education, Charles Layne says one of the program's unique aspects is the T&E Center's position as the industry's window to RIT's special resources, including facilities and faculty.

"It's almost impossible to get access to RIT's screen printing lab, electronic imaging lab, bindery lab and state-of-the art presses without the T&E Center," Layne says. "We put industry professionals in direct contact with RIT faculty, who are acknowledged experts. For instance, Bill Eisner, director of research and development and just one of the many instructors participating in Printech Week, has 30 years experience in the paper industry.

Continued on page 63

First Row, L-R—Denis Healy, Consultant; James Martin; Fred J. Bunegar; John W. Lowe; Robert San Miguel; John R. Higgs; Kathy Simms, M.U. Staff; Bric A. Wheeler, M.U. Staff; *2nd Row, L-R*—R. Macy Harris, III; Jack P. Smith; Dennis L. Wheeler; Brian R. Johnson; *3rd Row, L-R*—Thomas J. MacDonald; William C. Duggan; Joseph R. Ryan; *4th Row, L-R*—Philip R. Jones; Frank J. Chesnos; Les Steers; *5th Row, L-R*—Lawrence E. Koverman; Cay Bohnsack; Mark L. Steiner; *6th Row, L-R*—Richard E. Powell; Walter S. Scott, Jr.; David J. Donati. Not present when photo taken: Frank E. Campbell.

New High-Tech Printing Methods Impact on Paper: A Technology Review

William C. Lamparter is a well known printing industry analyst whose company specializes in technical-economic evaluations and the development of business and marketing strategy for printers and suppliers to the printing industry.

by William C. Lamparter, president, PrintCom Consulting Group

New market requirements, increasing competition, and the availability of an evolving range of high tech production equipment are combining to change printing production from a craft-dominated, manually-controlled series of operations into an automated flow line manufacturing business.

Print buyers are stressing the need for higher and more consistent quality as they increase their use of spot, process and special colors as well as on-press coatings. At the same time, print buyers in almost every segment of the industry are demanding faster turnaround times—shorter production schedules with a high degree of on-time delivery reliability.

Paralleling general marketing trends, the end use market for printed products continues to fractionalize—more specialized or targeted items for highly defined and frequently limited audiences. The net result for the printer is shorter press runs but more individual jobs.

Narrow Cast Market Requirements

To meet merchandisers' and publishers' requirements to create products for these "narrow cast markets," on-press or in-line finishing is growing and more specialized techniques are being utilized in the binders.

One example of these market-demand technology-possible specialized techniques is the increasing use of personalization using ink jet and laser computer controlled imaging devices. Direct on-the-product ink jet labeling, sometimes coupled with individualized messages, is rapidly replacing the more traditional paper-glued-to-the-product labeling.

In the U.S. catalog merchandising field, the ability to address both the catalog on the outside and the order blank on the inside with the recipient's name, address, and other coded data has become a virtual must. The ultimate in personalization has been experimentally tried by some magazines individualizing by ink jet imaging what would otherwise appear to be a run-of-the-book advertisement. These and other techniques that customize the printed product in some fashion are expected to find increasing use in 1987.

Changing Inventory Policy Impacts

Some printers, particularly those in the folding carton, label and package insert business are beginning to be asked to make smaller, more frequent deliveries. As print customers implement overall inventory reduction or just-in-time inventory strategies, the requirements of these programs are being applied to their print purchases. In these circumstances, printers are frequently being told that they must maintain previous pricing and cannot charge a premium for the more frequent delivery requirements.

In essence, printers are being told to improve their own materials management practices. This is a trend that we expect to become more visible and to accelerate during 1987. The printers' response to these market-driven requirements will impact on paper manufacturers and merchants.

Increasing Competition on Two Fronts

The importance of individual printers being able to respond to these new and changing market requirements is underscored by the growth of competition from both alternative media and from within the printing industry itself.

A characteristic of the "new high tech" is that much of the new equipment is more productive—on almost any basis of measurement—than the hardware which it is replacing. As the industry has technologically updated itself, capacity has increased at a rate faster than the industry's overall growth.

At the same time, the industry is experiencing increasing competition from the electronic media. For example, during 1987 some forms of consumer cataloging may be challenged by the growing phenomenon of home shopping via cable TV. It is clear that advertisers and information publishers have a widening variety of media choices in addition to print.

Printers Respond to Changing Requirements

Many printers have responded to the changing requirements of the marketplace by reequipping themselves with state-of-the-art machinery designed to improve quality while increasing productivity through the utilization of computerized process control techniques. Front end, pre-press and press developments in the traditional printing industries focus strongly on the production of multi-color and process color work.

This reflects the increasing demand for multicolor work. The volume of both spot and process color work produced by commercial printers is expanding at the rate of about 10% to 12% real growth annually. Black-and-white or single color commercial printing is declining at the rate of about 2% to 4% per year in terms of absolute volume.

The growth in color is fueled by both market demand and the printing industry's ability to continuously improve color quality while simultaneously reducing production costs. The fact that color is easier and less expensive than ever to produce, further stimulates the market demand for multi-color work.

Single Color Volume Shift

The decline in commercially produced single color work is the result of two factors—one technical and one-market driven. The growth in color comes partially at the expense of single color work. It is a matter of product substitution. That is, the buyer switches his purchased end product from a one color to a multiple color job, resulting in a growth in color and a decline in single color work. This is the market-driven aspect of the change.

The second factor in the apparent decline of single color work in reality represents a shift in where that work is produced. The new imaging technology—electrostatics, laser printing and the automation of the process—makes it easier and easier for the creator or user of the printed product to produce it himself. Thus, the single color decline that shows up in commercial printing statistics partially represents a migration of work to the customer because technology developments provide cost and convenience advantages for the do-it-yourselfer.

Analysis of the in-plant market indicates that single color work is growing at a rate exceeding the commercial printing industry's decline in this category. Therefore, overall single color work is in fact growing, but it is "lost business" for the traditional commercial printer.

From the perspective of a paper supplier, the increase of single color production in the in-plant market offers continuing growth opportunities. The increasing use of color presents a growing challenge to paper manufacturers. As more individual colors with increasingly heavier coverage are laid down on both sides of the sheet, further consideration needs to be given to the printability of the paper and then to the sheet's handling and finishing characteristics in order to produce the product on high speed in-line finishing equipment.

Capital Substituted for Labor

Almost without exception, the new machines, methodologies and technologies are aimed at improving productivity and increasing quality by reducing the number of manufacturing employees required, and enabling machines to produce products with less dependence on adjustments made by their human operators. Smart scanners, intelligent dryers, thinking presses and no-operator-required handling devices are all in the catalog of currently available graphic arts equipment.

Once an industry that combined the delicate

> ***The industry is experiencing increasing competition from the electronic media.***

Out of the maze of desk-top publishing and related technology there are several clearcut trends emerging.

touch of the artist and the highly honed skills of the apprenticeship-trained craftsman with manually-controlled manufacturing, today's world of printing production is one of process controls based on microcomputer technology.

Electronics and the computer have become a part of everything from cameras and film processors to hand-held densitometers and sophisticated image processing and assembly systems. The computer is embedded in presses and in bindery equipment and is the heart of today's management information systems. The computer-on-a-chip in conjunction with sensors makes automatic adjustments or provides numerical data enabling an operator or a technician to monitor the production process. A clear trend has emerged of improving print productivity and increasing quality by substituting capital and technology for labor and human judgment.

Evolutionary Versus Revolutionary

While some of the new developments are evolutionary enhancements of traditional reproduction technology, others shake the very foundations of the industry by introducing entirely new concepts as to where, when and how a printed product is produced or where some major step in the production process is accomplished.

Although all aspects of printing production are affected, the application of electronic information handling and processing techniques to pre-press functions, from the generation and recording of ideas to the making of a printing plate, is the leverage point of change that will eventually reach into every printing plant or reproduction facility.

Both the evolutionary and revolutionary trends in the front end of the printing process have a major characteristic in common—they are resulting in a continuing movement of front-end production out of traditional graphic arts manufacturing channels back into the control of the editorial and artistic or graphic functions. Traditional manufacturing processes are being integrated into the creative process. These first stage of the printing process changes impact on author, artist, editor, publisher and printer alike.

Desktop Publishing Phenomenon

Nineteen eighty-six saw the birth of a phenomenon dubbed "desktop publishing"—a catch phrase used to describe the computer-based changes taking place in the creation and manipulation of text and graphics in the front-end process.

The desktop computer, including Apple McIntosh and IBM compatible PCs as well as the more powerful engineering workstations such as IBM RTs and Sun Microsystems terminals are the foundation of the desktop publishing concept. But what converted advanced word processing to publishing was the development of the laser printer.

Most desktop publishing systems are arranged so that text is input and graphics created on the PC or engineering workstation and then output either to a relatively low cost laser printer or to a conventional phototypesetter.

In addition to creating graphics on the PC, graphic material may be lifted from other databases that can be PC-processed. This information is then incorporated into the document being typeset. Graphics created outside of the system may be entered through the use of a digitizer or scanner. Low-end digitizers are available for under $5,000 while high-end equipment is priced between $20,000 and $50,000.

Once text and graphics have been input and integrated into a page format, the material may be output either on a laser/electrostatic printer or through a phototypesetter. Some view the laser output device as primarily a proofing machine while others see it as a final output device that supplies camera-ready mechanicals. With laser printers now spanning the range from 300 to 1,000 dots per inch (DPI), proof or final output at varying degrees of quality is feasible. Another group of users sees the laser printer as a short run printing press—a part of "on-demand" printing systems and the trend toward increased single color in-plant volume.

Out of the maze of desktop publishing and related technology there are several clearcut trends emerging:

- No matter what typesetting approaches are utilized, the vast majority of all text will be generated on a word processor—either directly input by an author as a part of the creative process or transcribed into a system by a secretary who may be combining dictated information with handwritten notes or what have you. The word processing phenomenon is virtually universal.
- Once input into a word processor, a keystroke should never have to be repeated in the author-to-typeset output processing of material.
- The entire concept is new and still evolving, but the market demand for products that will increase the span of control over the editorial

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With the PC microchip developments that are in the pipeline, it's clear that we have only seen the tip of the iceberg.

and artistic product, shorten production cycles and make revisions practical and economically feasible, even at the last minute, has clearly been established. While some systems are being purchased on the basis of cost reductions, control, timeliness and convenience are the more critical factors.

- Although some have characterized the approach as amateur publishing or typesetting, this view of the market is a short-term comforting illusion—the demand is clearly coming from a broad range of users that reaches into the professional-for-profit publishing ranks.

- The proliferation of both hardware and software suppliers makes system selection a difficult task—but it is resulting in a flow of improvements and cost reductions.

While desktop publishing may not be as easy as the ads and popular magazine articles make it sound, it is not so difficult that the phenomenon is going to go away. And with the PC micro-chip developments that are in the pipeline, it's clear that we have only seen the tip of the iceberg. Desktop publishing is going to get easier to do with improved quality, further stimulating the migration of front-end preparation from the traditional graphic arts plant to the author, artist and creator—that is a trend that will continue into the 1990s.

Image Processing Developments

Recent developments in the highly sophisticated and computerized world of color image processing by Scitex, Crosfield, Hell, Eikonix and DS America have emphasized increased systems capability, ease of operations and reduced capital investment cost.

In brief, color image processing system capabilities are being expanded and enhanced, while systems have become less costly and less complex to operate. Scitex in particular has led the way in taking their systems out of the "clean room, white coat, special environment cocoon" into devices suitable for the more general office environment.

An increasing number of publishers are studying the new generation of equipment for possible installation in their editorial and artistic offices. The motivation is to gain greater control over all front-end processing—taking it out of the hands of the printer and putting it into the creative side of the business.

A Technology Collision

An analysis of computer graphics development trends suggests that 35mm slide and business graphics production methods, desktop publishing, the creation of TV imagery and graphic arts image processing approaches are on a collision development course that will eventually lead to the similar but somewhat different approaches being blended and used as the basis of a new all-electronic, graphics front-end from artistic creation to platemaking or direct digital printing systems. The tide is clearly moving in this direction, and, in this analyst's judgment, the question is no longer if, but when.

While there are a number of graphic arts-oriented systems that now incorporate some aspects of video technology, Sony's demonstration of a prototype video-based electronic picture processing system at the American Newspaper Publishers Association Exhibition and, more recently, at PIA's Materials Management Conference, was an interesting harbinger of all-electronic front-end systems to come.

The All-Electronic Front-End

The Sony system is made up of a series of already available standard components combined with new specialty devices arranged so that the system can process pictures electronically in several modes from single frame photography through color video raster image (unscreened) color separations.

The system demonstrated by Sony enables a photographer to take a video picture in the field and transmit it back to a main office, using either high speed digital data lines or, when necessary, standard telephone lines as might be available in a cellular automobile phone.

The images are received at a main office where they may be reviewed and immediately processed or archived onto a one-write video disk storage system. In addition to field photography, the array of available hardware makes it possible for video images to be taken from "off-the-air TV transmissions" or from reflection copy or slides.

The most fascinating portion of the video technology demonstration was the Mavigraph printer which will produce a reasonable quality color print on paper in three minutes at the TV resolution of 512 lines in a fixed print size of 4 5/8 inches high by 6 inches wide. This print can then be used to create color separations in a normal fashion. The end product quality shown was in the range of good newspaper process color.

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Video Color Separations

Shown in prototype form was a specially modified version of the Mavigraph printer that produced color separations by converting the red-green-blue (RGB) TV color data to the graphic arts industry yellow-magenta-cyan-black (YMCB) data. The color separations are produced as four individual black paper prints that must still be screened and converted to a negative for conventional stripping and use. While electronically complex, the total system appears to be easy to use with no special skills required.

In commenting on these and other similar developments all designed to take, handle and process color images through platemaking without the use of film, ANPA technical vice president William D. Rinehart said, "It is my opinion that ten years from now we will look back at 1986 as the start of a new revolutionary era in all-electronic picture processing."

Press Still at Heart of Industry

While electronic front-end developments offer the greatest possibility of significant changes in the short term and radical, structurally upsetting changes in the long term, it is still the printing press that is the heart of the industry.

There is an increasing availability of printing process control instruments and devices that measure, sense, compare, calculate and automatically adjust or provide information enabling an operator to control the production process from a console. This was the underlying technical trend embodied in many of the new or improved press and related equipment products introduced to the industry during 1986.

Many of today's "new-breed scientifically-oriented" printing managers consider controls and peripheral devices to be more important in achieving productivity and quality than the printing units themselves. Equipment that shortens makeready times, reduces running waste and helps to maintain consistent quality are generally viewed as the most important.

At the Drupa Exhibition in Dusseldorf there were demonstrations of what is coming close to the totally automated offset process with closed loop inking and dampening systems. What is in the works for 1987 and beyond is the further development of these printing press process controls, making presses easier to operate while producing quality at high speeds. The paper manufacturer must consider the possibility that new paper requirements will emerge as both sheet and web press speeds continue to move up.

The New Flexo

One of the most interesting press developments of 1986 was the improvement and growing acceptance of flexography as an alternative printing process for the newspaper industry. A major free-standing newspaper insert printer and at least one directory printer have also committed to flexography. In addition to these specialty areas, the continued rapid development of newspaper flexo has long term implications for some segments of the commercial market.

Flexography appears to solve two of the newspaper industry's nagging production problems—excessive paper waste and ink rub-off. The key is that newspaper flexo utilizes waterborne inks which dry on top of the sheet rather than penetrating into the paper. Colors are sharp, crisp and vibrant.

Papermakers need to monitor the progress of newspaper flexo so as to understand the implications of the process as it is further improved and increases its potential for utilization in at least some segments of the commercial printing industry. It is this analyst's opinion that, while it will happen slowly, the "new flexo" will spread to other applications beyond newspapers and similar products.

The Color Proofing Wars

The predictor and, to a degree, the control in the output of the printing press—the color proof—received major developmental attention during 1986. After several years during which a few approaches to proofing dominated the industry, a race has broken out among the manufacturers to bring new, improved and digitally based systems to market.

With over sixty entries in the field, the "color proofing wars" can be expected to continue into and beyond 1987. It's all a part of bringing more science, predictability and repeatability into the printing production process.

Cut, Stitch, Fold by Computer

Computers and microprocessors are infiltrating bindery equipment to improve both productivity and operational versatility. Continuing a trend that became very evident at Print'85, bindery equipment has been developed to specifically handle short run and long run work as well as to meet the needs of small, medium and large operations, making it possible for different size companies with varying run lengths to provide bindery services on an almost even basis.

The paper manufacturer must consider the possibility that new paper requirements will emerge as both sheet and web press speeds continue to move up.

Eventually, all mills and merchants will need to identify their materials shipments with bar codes.

Cutters, folders and saddle stitching equipment shown at Drupa were in an order of magnitude more productive than the equipment shown at this international extravaganza just four years earlier.

In what was one of the more dramatically visible changes in the bindery, both Muller-Martini and Ferag showed improved versions of their automated palletizing equipment utilizing a wheel or disk concept. In this approach, which was also shown at the ANPA Exhibition, a stream of products coming from a web press is wound onto a wheel for storage until the product is needed in finishing or distribution operations. When the product is required in the bindery, the process is reversed, the wheel is unwound, and the product is fed directly into bindery hoppers.

Although some consider this to be more of a materials handling development than true finishing equipment, it is, nevertheless, of interest to bindery operators because of its potential to link the bindery with storage areas and the press, reducing handling damage as well as labor. The approach, which has initially been used by newspapers, is being further developed and refined with the expectation that it will be applicable to magazine, catalog and commercial printing operations.

Materials Management Emerges

Not to be overlooked in the onrush of printing technology developments is the emergence of materials management as a major new factor in printing production. While materials management encompasses a broad range of activities from materials selection, handling and ultimately, scrap disposal, most visible to the paper industry is the development of bar coding controls and electronic manifests.

With the development of a variety of automated data collection devices designed to provide input into printing management information systems, the use of bar code identified materials including paper—both rolls and skids—is expected to increase dramatically by the early 1990s. Eventually all mills and merchants will need to identify their materials shipments with bar codes in a structure that provides for easy, and in many cases, automated reading.

More broadly, the whole area of materials management can be expected to develop, particularly as printers realize both the necessity and benefits of reducing their inventories, while at the same time remaining responsive to the reduced production time cycles permitted by their customers. It's an area for paper suppliers to monitor and help develop in conjunction with their printing customers.

The Impact of Technology

Technology that enables the printer to produce an ink-on-paper product faster, with emphasis on the ability to cost effectively reproduce color while improving quality by reducing operator judgment and skills, is increasingly available as techniques developed primarily in other industries are transported into the graphic arts. Technology is what keeps print competitive in the face of a widening array of alternative information dissemination media.

Advances in printing production technology are being absorbed by printers at varying rates. This is, in effect, creating two broad classes of printing companies—the haves and the have nots. The have nots are finding and will find it increasingly difficult to compete with the haves. The competitive situation within the industry is increasing, in part because of over capacity and in part because of differences in the application of technology.

Technology represents both a threat and an opportunity for the printer. Our analysis strongly suggests that, while the opportunities are virtually unlimited, many printers are mired down in a swamp of technological hesitation and are failing to seize the available opportunities. One of the biggest dangers to a printing company is to be infected with the disease of technological procrastination and confusion caused by the infection of claims and counter-claims by manufacturers and of varying interpretations of the industry's technological and competitive directions.

The development of this situation has been much in evidence at recent congresses, symposia and exhibitions. Today's high speed persistent push of technology places a premium on professional management that can keep one eye on new production developments and the other on its marketplace. It places a premium on the support that printers can obtain from their suppliers such as the paper industry.

Those printers that fail to recognize the implications of the new wave of technology are setting themselves up for disastrous failures. Those that learn how to manage the intruding technology have an unparalleled opportunity for growth and success. The same situation exists for suppliers to the manufacturing printer.

What Buyers Want Printers to Know About Paper

This Special Report was first published in January 1983 by the National Association of Printers and Lithographers (NAPL) and is still a valid explanation of the subject. Authored by the late Charlie Morris, formerly of Saxon Paper, the report is valuable to printers and paper people alike. A portion of the report is printed here by permission of NAPL. The full text may be obtained from the Association at 780 Palisades Avenue, Teaneck, NJ 07666.

People in printing are expected to recommend the one best paper for the purpose—best functionally, most economical, best aesthetically. They are expected to recommend the best value for the money. They are expected to recognize, identify, and then locate any paper the printing job requires.

Interpreting further, they are expected to assure their customers that the paper they recommend will possess the following qualities in balanced relationship:

1. Proper surface for the process.
2. Proper surface for the needed reproductive values.
3. Proper surface character and finish to assure truest reproduction of the artist's rendering.
4. Proper surface character and finish to provide highest fidelity of the camera art.
5. Proper surface character and finish for the several families of type faces.
6. Proper surface for after-printing finishing: varnishing, lacquering, laminating.
7. Proper strength qualities, such as wearability, foldability, tearability, eraseability. Proper strength characteristics for die-cutting, for embossing, for the unusual handling chores in binders' plants and for actual end-usage.

"There's no place for second-guessing paper selections once the paper has passed through the printing press," was a note of warning from one printer asked to comment about the effectiveness of paper salesmen. Then the printer went on: "We believe we have a perfect right to expect representatives of paper merchants to guide us in the proper selection of paper. We have our own ideas on the subject but we like our judgment confirmed. Also, we expect to be told when we've made a poor selection." *The same could be said by consumers about their printers.*

Printers are quite clear in answers to the questions put to them about their interpretations of *best values.* They say they hold their paper salesmen responsible because, as one buyer of large quantities of paper expressed it, "This is where the paper salesman can be very definite about his recommendations. His experiences with a host of other printers is base enough for him to know where of he speaks."

These are some of the questions about *best values* that properly concern buyers of paper in print shops.

1. Can we use a paper that is less expensive, yet will help achieve the same results as more costly papers?
2. Are there any new papers on the market that serve the purpose better than the old?
3. Can we use a lighter weight paper and yet achieve the same results?
4. What is the whitest paper on the market?
5. What is the brightest paper on the market?
6. What is the most opaque paper, weight-for-weight?
7. Have we given groundwood papers the consideration they deserve? Can they be used as replacement for some other papers of superior quality?

Buyers of printing expect their printers to offer believable replies to questions like these, and many more about paper and its relationship to their individual paper requirements.

Printers are also expected to know the answers to such questions as the following:

1. What's new and different?
2. What's new, and what is more economical?
3. What's old and more useful; what's old and more economical?
4. How can I get more paper for my money?
5. How can I use colored papers to better advantage?
6. What's available in off-beat, unusual papers?

Since printing buyers expect their printers to be *headquarters* for paper knowledge, how do you learn to function in that role?

First, become possessed with one idea: *The Job Determines the Paper.*

The idea is as good as new and will continue

NAPL: Service to Printers

The National Association of Printers and Lithographers (NAPL) is a nonprofit graphic arts trade association. Founded in 1933, the Association has grown from a small group of pioneer offset lithographers to over 3,600 member firms.

Following the goals of its founders, NAPL is dedicated to serving the industry by providing management, education, training, publication and consulting services. NAPL's well-known *Blue Book* hourly cost studies, Executive Certification Program, *Quarterly Business Indicator Report* on economic trends, and annual Top Management Conference are only a few of its more popular membership services.

NAPL member firms range in size from small family-owned shops to much larger corporations with several hundred employees. Although the majority of members are U.S. based, the Association serves a growing number of Canadian companies and firms located outside of North America.

Headquartered in Teaneck, NJ, the Association supports a staff of 34 people. Charles Alessandrini, who recently celebrated his 20th year with NAPL, is its president. I. Gregg Van Wert, 13 years with the Association, serves as executive vice president.

NAPL is one-third owner of the Graphic Arts Show Company, sponsor of Graph Expo. Co-partners are Printing Industries of America (PIA) and the National Printing Equipment and Supply Association (NPES).

to be as good as new a century hence. Believe that there is one best paper for every purpose. Then look for it. Your time won't be lost.

There's a best paper—or a best-of-class—for any printing purpose you name. It might be a cast-coated paper for an annual report cover, or a luxury cover stock for a handsome souvenir keepsake.

Investigate the field thoroughly, then be sure to suggest the best by every inch of your yardstick.

Know best values. There is positively one best value, just as there is one best paper.

Don't be fooled by the old numbers game: No. 1 coated book, No. 2 coated book, etc. Rather, know the brands, know manufacturers. Many so-called No. 2 papers, it is not unreasonable to suggest, may very well be superior in many qualities to other manufacturers' No. 1 values. Many papers of equal visual value and identical price may not be equal in end usage and press worthiness. Buyers of printing expect you to know the difference between them.

Buyers of printing expect you to know which papers are brightest, which papers are the most opaque, weight-for-weight. To discover the answers, you should study what the market is offering on a regular, systematic basis, because papermakers are constantly improving their products. Papermakers never leave well enough alone where whiteness, brightness, and opacity are concerned. Keep abreast of those changes. Make your own visual tests on a regular basis so that you can be convinced your recommendations are proper.

As frequently as possible, make swatches of papers to show their variations in whiteness, brightness, and opacity. Discover many side benefits to this kind of product knowledge. You'll learn, for instance, that some papers of equal brightness, whiteness, and opacity-to-weight ratio are not identically priced. It's the printer's job to recognize and capitalize on these points of difference. Caution: Don't take another's word. Check for yourself. *Know* all about the differences.

How to Upgrade Paper Selection

Linger over these few thoughts about upgrading with paper:

1. Suggest a fancy embossed finish. The altered printing surface provides an exciting third-dimensional background, making black inks blacker and colored inks brighter and truer.
2. Suggest papers that are brighter and whiter for greater distinction of highlight areas and margins when the print job involves process colors.
3. Suggest papers that are brighter and whiter to provide greater contrast when you know the print job involves black and white halftones or duotones.
4. Suggest colored papers for printing with colored inks. The effects are strikingly different, while the costs are not substantially greater than printing colored inks on white papers, or black inks on colored papers.
5. Suggest heavier-weight paper than the printing job may require. The extra weight and thickness add importance to the piece.

Upgrading for function is always desirable, since use-qualities often require superior papers. Sell more durable papers, papers that demonstrate greater wearability.

Be First With the New

Of course, your "what's new" department doesn't operate every day. There just aren't enough new things in paper to report to your customers every day. However, when news is made, printing buyers want you to tell them. So tell them first.

It's true, of course, that what's new to one printing buyer may be old-hat to another. Another printer may have beaten you to the punch. Just the same, the idea of trying to be first with the news, when the news is fit to proclaim, is just good selling practice.

You need never be lost for paper news when you're calling on your trade if you will bear in mind that something is bound to be new to someone. Your paper merchant supplier is your best friend in this regard. There are such things as graphic arts fashions—trends in design, in type faces; even trends in certain kinds of papers and certain colors in papers. Latch onto them. Fast.

Cash in on Trends

1. Start today to collect and file every new sample book of paper. Throw out all the old ones and start fresh. File by kinds of paper: book, text, cover, bristol, bond, etc.
2. See every paper merchant salesman who calls at your office. Pick their brains and deplete their supply of samples.
3. Get your name on the mailing lists of all the papermakers.
4. Collect samples of actual jobs as well as the portfolios and demonstration kits the papermakers distribute as idea stimulators.
5 Develop a library of printed specimens and arrange them by business—autos, department stores, speciality shops, banks, garages, etc. Have them ready to be shown to printing buyers as ideas.
6. Read the trade press, *including* the magazines printing buyers and designers read. Keep abreast of what's new in design.
7. Visit all the trade shows. List exhibits that you believe will be interesting to your customers.
8. Watch for any quality changes in the papers your customers use most. Compile swatches periodically, maybe every two or three months, showing whiteness, brightness, and opacity changes. Watch for superiorities. Chart them by heading: coated book, uncoated offset, vellum, opaque, bristol, text, etc. You will discover quality leaders in every classification. And you can recommend them to your customers because you have the facts to support you.

One last piece of advice: Call on your customers frequently enough so that you will have more than your share of opportunities to influence the choice of paper. Put an old friend to work: the dummy. Your dummy will speak louder than all the words of paper knowledge you can summon.

by Charles V. Morris

CHAIRMAN'S CORNER

An Industry With a Split Personality

The paper distribution industry is made up of two very different segments: printing papers and industrial products. The worlds are often so different that the trend today has been toward separate sales forces in those houses that carry both types of paper products. Creating sales product specialists is a good thing for our business.

NPTA's role has always been to serve both sectors of the industry giving each information that will help companies prosper. Although their product lines may be very different, NPTA's goal has not changed: it is to help member companies operate more economically, productively and profitably. This mission works to accentuate the similarities among successful companies, not demonstrate differences.

This issue of *MN* does two things for readers. First, it focuses attention and provides useful information for printing paper merchants. For them, this one is a keeper. Second, it serves industrial paper merchants in a different way. By sitting down with this issue, the industrial distributor can spend an hour or so and be up to speed on the important issues within this product category. It's educational.

As an industrial packaging distributor, we will benefit from this issue of *MN*.

Francis J. Houlihan

Francis J. Houlihan
NPTA chairman

The late Charlie Morris at an NPTA-sponsored Web seminar.

Printing Paper Division Sets New Course for Industry

The National Paper Trade Association's Printing Paper Division is organized and run by a group of dedicated volunteer leaders. The printing paper group has been responsible for the development of industry programs that benefit distributors and has worked to improve relations between mills and merchants, and merchants and printers.

Frederick J. Stabbert

Many projects conducted by the Printing Paper Division Committee have given merchant managers and sales people useful tools that have helped them conduct their businesses more efficiently. These have taken the form of sales compensation surveys, a quality reporting system, convention programs for management, and marketing brochures. The goal of the group has long been to review trends in printing paper distribution and to create action plans to improve the industry.

Work in Progress

The Printing Paper Division Committee, chaired by Fred Stabbert, director of business development for the Hammermill Distribution Group, is currently working to create inhouse training modules for printing paper sales people in product knowledge areas. The first one, "How Paper is Made and Used," will provide an indepth study of printing paper from the tree through its many applications. The module will include video tape segments, a leader's guide, participants' workbooks and samples of all the elements used in paper manufacturing. The program will be well-suited to everyone in the graphic arts industry.

The group is also planning its 1987 Convention Management Program. This year the focus will be on printing customers and their changing needs.

Ongoing Projects

The Printing Paper Division Committee is responsible for the very successful Printech Week program held at Rochester Institute of Technology twice each year. The recently held week-long seminar for printing paper sales people was sold out (see article in this issue).

The program continued to improve and stay on top of the changes in graphic arts technology that sales people need to know. This year Printech Week will be held April 26 to 30 and October 18 to 23.

The Committee is also responsible for the "Quality Report" form that is standard throughout the industry. (The form appears in the Reference Section of this issue as camera-ready copy which readers may use in their own companies.) The group has monitored it in the industry, and the Quality Report was recently revised.

This special issue of *Management News* is also a result of the Printing Paper Division Committee's work. They felt it was necessary to provide more indepth information to merchants (and printers) on paper and paper distribution.

Printing Paper Division Committee

Frederick J. Stabbert, chairman
director, business development
Hammermill Distribution Group
Erie, PA

Darel B. Anderson
president
Leslie Paper Company
Minneapolis, MN

James Duncan
executive vice president
WWF Paper Corp.
Bala Cynwyd, PA

William H. Frohlich, secretary
vice president communications
National Paper Trade Association
Great Neck, NY

William E. Hunt, Jr.
president
Caskie Paper Co., Inc.
Lynchburg, VA

Sydney T. Jones, III
president
Hudson Valley Paper Co.
Albany, NY

William E. Kelley
vice president
Carter Rice
Boston, MA

T.L. Pitchford
executive vice president
Rolland, Inc.
Rexdale, Ontario

Richard P. Wales
vice president
Butler Paper Co.
Englewood, CO

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Art Turock, Art Turock & Associates

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D. Bruce Merrifield, Merrifield Consulting Group

***The Merchant/Manufacturer Relationship**

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Contact:
Bruce H. Linden
Education & Training Department
516-829-3070

Why the NPTA Paper Merchant is Better Than the Rest

The National Paper Trade Association inc. has been supporting the paper merchant industry for over 80 years. Members of NPTA should get this message across more often to customers: their connection with NPTA puts them ahead of the competition.

NPTA is a service organization representing paper and allied products distributors throughout the United States, Canada and 30 foreign countries. Member firms are kept up-to-date on the trends affecting the wholesaling of paper, new management and sales techniques, financial and operating ratio information; and the Association acts as a vital link between mills and merchants, and between merchants and customers.

The Association continues to train its members to operate more productively and efficiently. This means that NPTA member merchants are the leaders in their field ... giving their customers the right products and services they need to support their business enterprise.

Why You Should Do Business With an NPTA Paper Merchant

Not all paper distributors are alike! The merchant who is a member of the National Paper Trade Association is a leader. He provides his customers with the right paper products that will do the job right the first time and every time.

The NPTA member merchant stocks a wide variety of grades of paper and products. He serves as the "customer's warehouse" and is a centralized source for many different items.

The NPTA Merchant Is Your:

- Paper expert—whenever you need to know about paper products, call a specialist.
- Paper sampler—dummies and samples are provided whenever needed for mailing weight and to compare stocks.
- Trouble-shooter—when problems arise, it's nice to know you have an NPTA paper merchant behind you.
- Sales associate—the NPTA merchant can actually help you sell printing by giving you help: printed samples and sales tools that are only available to him through NPTA.
- Credit facilitator—each customer has different credit needs and the NPTA merchant can suit each.
- Your friend in the paper business—whether it is for emergency fill-ins, adjustments, trial orders, or just for checking stock availability, your NPTA merchant is your direct connection to the paper industry.

NPTA Tracks a Changing Industry

The paper supply line is changing and NPTA paper merchants are on top of all the new developments. Why? Because the National Paper Trade Association is the only organization that provides member merchants with:

- Monthly sales, inventory and receivables levels in their regions
- Quarterly business conditions reports
- Annual financial analysis of the entire industry
- Performance analysis of each merchant operation with quarterly updates
- A monthly magazine that tracks new industry developments
- Specialized sales training seminars and courses
- Conferences on new technology and trends
- An Annual Convention that brings together paper manufacturers and paper merchants for a first-hand review of what's ahead in new products and opportunities
- Programs held around the country to train managers and industry leaders
- University-based programs of formal education
- A research facility that is part of a major university
- Video tape training programs
- Specialized marketing assistance and materials
- A "Who's Who" in the paper merchant trade.

More Information

For those who would like more information about the National Paper Trade Association or the paper merchant industry, please contact, NPTA, 111 Great Neck Road, Great Neck, NY 11021, 516-829-3070.

What You Should Know When Buying or Selling Paper

Material contained in this section includes handy reference charts and formulas that will be helpful to both paper merchants and printers

Roll Stock

Determining the length of a roll

When selling roll stock, if the width of the roll, the basis weight of the paper and the weight of the roll are all known (or can be measured), it is easy to find out the length of that roll in feet.

$$\text{Length of the roll in feet} = \frac{\text{Roll weight in pounds} \times 36{,}000}{\text{Width of the roll in inches} \times \text{basis weight}}$$

Example: What is the length of a roll of stock (in feet) that has a 60 lb. basis weight, is 48 inches wide and weighs 160 pounds?

$$\text{Answer: } \frac{160 \times 36{,}000}{48 \times 60} = \frac{5{,}760{,}000}{2{,}880} = \underline{2{,}000 \text{ feet}}$$

Find Feet Per Pound

If the basis weight and roll width are known, find its footage per pound on this chart.

Roll Width (in inches)	Basis Weights						
	25	30	35	40	50	60	75
12	120	100	85	75	59	50	40
15	96	80	68	59	48	40	32
18	79	67	56	50	40	33	26
20	72	59	51	45	35	29	24
24	59	50	43	37	29	25	20
30	48	40	34	30	24	20	16

Determine Square Yards Per cwt

Basis Weight	25	30	35	40	50	60	75
Sq. yards/cwt	1330	1100	950	830	665	555	445

SHEET STOCK

Sheet Areas of Basic Sizes

SIZE	SQUARE INCHES	TYPES OF STOCK
8½ × 11	93.5	Copier paper
8½ × 14	119	Copier, Legal
17 × 22	374	Writing, Ledger, Bond
18 × 31	558	Cover, Manuscript
19 × 24	456	Blotting papers
20 × 26	520	Cover Stock
22 × 28	616	Blanks
22½ × 28½	641	Bristols
24 × 36	864	Tag, Wrapping
25 × 38	950	Offset, Text
25½ × 30½	778	Index

Find the Cost Per Hundred Lineal Feet

$$\text{Cost/100 lin. feet} = \frac{\text{Price/cwt}}{\text{Feet/lb.}}$$

Example: What is the cost of 1,000 feet of 60 lb. basis weight paper that is 30 inches wide and priced at $20.00 cwt?

Answer: The chart on the left shows that there are 20 lineal feet for every pound of 30 inch width paper that has a basis weight of 60 lbs.

$$\text{Cost} = \frac{\$20.00}{20} = \$1 \text{ per 100 lineal feet}$$

Ordering Paper

When specifying paper for an order, always provide the following information:

Quantity—tons, pounds, skids, cartons, sheets, rolls
Brand Name—mill brand, house brand
Color—specific to the brand chosen
Finish—specific to the brand chosen
Size—by standard or special size, roll diameters
Weight—Basis weight of the sheet

Find the Number of Pieces Per Sheet

Depending on grain direction and its importance, roughly divide the length of the piece in question into the length of the sheet of stock and its width into its width. Or, the width of the piece into the length of the sheet, etc.

Example: How many 6 × 8 inch cards can be printed on a 20 × 26 inch sheet?

Answer: $6\sqrt{20} = 3$ Approx. $8\sqrt{26} = 3$ Approx.
$3 \times 3 = 9$ Total
Or $6\sqrt{26} = 4$ Approx. $8\sqrt{20} = 2$ Approx.
$2 \times 4 = 8$ Total

Find Weight of Special Size Stock

To determine the weight, for example, of 60lb Book paper cut to 20×25, you must first multiply the basis weight of the stock in question by the area (in square inches) of the special cut, then divide by the usual area of a sheet of that stock in its basic size.

$$\text{Answer: } \frac{60 \times (20 \times 25)}{(25 \times 38)} = \frac{60 \times 500}{950} = \frac{30{,}000}{950} = 31.58 \text{ for a sheet ream or, } 63.16 \text{ per } 1{,}000 \text{ sheets}$$

Find the Weight of Any Number of Sheets

Take the number of sheets times the weight per 1,000 sheets, then divide by 1,000.

Example: What is weight of 2762 sheets of 25×38, 160M?

$$\text{Answer: } \frac{2762 \times 160}{1000} = \frac{441{,}920}{1000} = 441.92 \text{ pounds}$$

Avoid Paper Waste—Choose the Right Size

Best Form Size	Standard Stock Size	# Pieces From Sheet	# Pieces From Ream	Best Form Size	Standard Stock Size	# Pieces From Sheet	# Pieces From Ream
2⅛×2¾	17×22	64	32M	4¾×8	19×24	12	6M
2⅛×3½	17×28	64	32M	5½×8½	17×22	8	4M
2⅛×5½	17×22	32	16M	5½×17	17×22	4	2M
2⅛×7	17×28	32	16M	6×9½	19×24	8	4M
2⅜×3	19×24	64	32M	6×19	19×24	4	2M
2⅜×6	19×24	32	16M	7×8½	17×28	8	4M
2¾×4¼	17×22	32	16M	7×17	17×28	4	2M
2¾×8½	17×22	16	8M	8×9½	19×24	6	3M
3×4¾	19×24	32	16M	8×19	19×24	3	1500
3×9½	19×24	16	8M	8½×11	17×22	4	2M
3½×4¼	17×28	32	16M	8½×14	17×28	4	2M
3½×8½	17×28	16	8M	8½×22	17×22	2	1M
4×8½	17×28	14	7M	8½×28	17×28	2	1M
4×9½	19×24	12	6M	9½×12	19×24	4	2M
4¼×5½	17×22	16	8M	11×17	17×22	2	1M
4¼×7	17×28	16	8M	12×19	19×24	2	1M
4¼×11	17×22	8	4M	14×17	17×28	2	1M
4¼×14	17×28	8	4M	17×22	17×22	1	500
4¾×4	19×24	24	12M	17×28	17×28	1	500
4¾×6	19×24	16	8M	19×24	19×24	1	500

Uncoated Paper Standard Sizes and Weights

SIZE	WEIGHT					
25×38	50	60	70	80	100	120
17½×22½	20½	25	29	33	41½	49½
22½×35	41½	49½	58	66½	83	99½
23×29	35	42	49	56	70	84½
23×35	42½	51	59½	68	84½	101½
24×36	45	55	64	73	91	109
28×42	62	74	87	99	124	149
28×44	65	78	91	104	130	156
32×44	74	89	104	119	148	178
35×45	83	99	116	133	166	199
36×48	90	110	128	146	182	218
38×50	100	120	140	160	200	240
38×52	104	125	146	166	208	250
41×54	117	140	163	186	233	280
42×58	128	154	179	205	256	308
44×64	148	178	208	238	296	356
50×72	189	227	265	303	379	455
52×76	208	250	291	333	416	499

Coated Paper Standard Sizes and Weights

SIZE	WEIGHT							
25×38	50	55	60	70	80	90	100	120
17½×22½	20½	23	25	29	33	37½	41½	49½
20×26	27½	30	33	38½	44	—	—	—
22½×29	34½	38	41	48	55	62	68½	82½
22½×35	41½	45½	49½	58	66½	74½	83	99½
23×29	35	38½	42	49	56	63	70	84½
23×35	42½	46½	51	59½	68	76½	84½	101½
24×36	45	50	55	64	73	82	91	109
26×40	55	60	66	77	88	99	109	131
28×42	62	68	74	87	99	111	124	149
28×44	65	71	78	91	104	117	130	156
32×44	74	82	89	104	119	133	148	178
35×45	83	91	99	116	133	149	166	199
36×48	90	100	110	128	146	164	182	218
38×50	100	110	120	140	160	180	200	240
41×54	117	128	140	163	186	210	233	280
42×58	128	141	154	179	205	231	256	308
50×72	189	208	227	265	303	341	379	455
52×76	208	229	250	291	333	374	416	499

Comparative Paper Weights and Bulks

Using This Table: To compare weights in different grades—weights per 1000 sheets for one square inch should be reviewed. For example: 24 lb. bond (.128) compare with closely with 60 lb. offset (.126). Also, use this table to find the weight of 1000 sheets in any grade in any size. For example: 80 lb. offset in 22 × 30. The weight for 1,000 sheets for 1 square inch = .168. Multiply that by the number of square inches in question (22 × 30). 660 × .168 = 110.88 or 111 pounds for 1,000 sheets of 80 lb. offset in 22 × 30.

GRADE	BASIS WEIGHT	WEIGHT PER M SHEETS 1 sq. in.	THICKNESS OF ONE SHEET
Bond	9	.048	.0018
	13	.070	.0026
Basis—17 × 22	16	.086	.0031
	20	.107	.0037
	24	.128	.0042
Book	40	.084	.0033
Antique or	45	.095	.0037
Eggshell	50	.105	.0045
	60	.126	.0050
Basis—25 × 38	70	.147	.0060
	80	.168	.0065
	90	.190	.0075
	100	.211	.0085
	120	.253	.0100
Book	20	.042	.0014
Bible	24	.050	.0017
	30	.063	.0021
Basis—25 × 38	32	.067	.0024
Book	45	.095	.0021
Coated	50	.105	.0023
	60	.126	.0029
Basis—25 × 38	70	.147	.0034
	80	.168	.0040
	90	.190	.0046
	100	.211	.0052
	120	.253	.0060
Book	40	.084	.0025
English Finish	45	.095	.0028
	50	.105	.0033
Basis—25 × 38	60	.126	.0038
	70	.147	.0044
	80	.168	.0050
Book	40	.084	.0045
High Bulking	45	.095	.0050
	50	.105	.0060
Basis—25 × 38	60	.126	.0070
	70	.147	.0080
	80	.168	.0090
Bristol	100	.254	.0080
Smooth	120	.305	.0100
	140	.356	.0115
Basis—22½ × 35	160	.406	.0135
	180	.457	.0155
Bristol	82	.208	.0085
Vellum	100	.254	.0115
	120	.305	.0135
Basis—22½ × 35	140	.356	.0155
	160	.406	.0175
	180	.457	.0195

GRADE	BASIS WEIGHT	WEIGHT PER M SHEETS 1 sq. in.	THICKNESS OF ONE SHEET
Coated—1-side Litho	60	.126	.0032
	70	.147	.0042
Basis—25 × 38	80	.168	.0050
Cover	50	.192	.0075
Antique	65	.250	.0095
	80	.308	.0120
Basis—20 × 26	100	.385	.0150
	130	.500	.0190
Cover	50	.192	.0050
Coated	60	.231	.0060
	65	.250	.0070
Basis—20 × 26	80	.308	.0075
	100	.385	.0095
	105	.404	.0100
Index Bristol	90	.231	.0075
	110	.282	.0090
Basis—25½ × 30½	140	.360	.0120
	170	.437	.0135
Ledger	24	.128	.0040
	28	.150	.0047
Basis—17 × 22	32	.171	.0052
	36	.193	.0058
	40	.214	.0065
	44	.235	.0070
Offset—	50	.105	.0038
Standard Wove	60	.126	.0046
Basis—25 × 38	70	.147	.0052
	80	.168	.0059
	100	.211	.0073
	120	.253	.0085
Offset—Opaque	40	.084	.0037
Vellum	50	.105	.0042
Basis—25 × 38	60	.126	.0047
	70	.147	.0060
	80	.168	.0065
	100	.211	.0080
Offset—Text	60	.126	.0045
	70	.147	.0065
Basis—25 × 38	80	.168	.0070
Offset—Vellum	50	.105	.0044
	60	.126	.0055
Basis—25 × 38	70	.147	.0064
	80	.168	.0071
	100	.211	.0088
	120	.253	.0106
Tag	80	.185	.0060
	100	.231	.0075
Basis—24 × 36	125	.289	.0090
	150	.347	.0110
	175	.405	.0125
	200	.462	.0150
	250	.579	.0180
	300	.694	.0225

(This universal report form may be used by all industry companies. Use these pages as camera-ready copy. You may wish to imprint your company's name and address here.)

QUALITY REPORT

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Merchant Company	Address	Rep.	Phone	
Printing Company	Address	Phone	Date	
Printer Contact	Merchant Salesman	Merchant Invoice #	Printer P.O. #	
Mill/Supplier	Mill/Supplier Order #	Mill/Supplier Run #	Mill/Supplier Skid #	Roll #
Date of Report To Mill/Supplier	Date Paper R'cvd at Printer	Date/Time of Problem	Investigated By	

EXPLANATION OF PROBLEM

PROBLEM DISCOVERED	☐ At Printer	☐ First Pass	☐ After Printing	☐ Other ____	PAPER SHIPPED ☐ Direct
	☐ At Customer's	☐ Subsequent Passes	☐ Bindery	________	☐ Merchant Stock

PAPER DETAILS	Grade	Basis Weight	Sheet Size	Roll Width
	Quantity		☐ Cartons ☐ Skids ☐ Rolls ☐ Reams	
	Color	Grain	Finish	

WAS PAPER CUT BY: ☐ Mill ☐ Merchant ☐ Printer ☐ Other ________ Was Paper Wrapped Until Printed ☐ Yes ☐ No

PRINTING DETAILS	Process Used	Press Make/Size	# of Units	# of Colors/Sequence
	Press Speed ______ IPH ______ FPM	# of Passes	Printed: ☐ Grain Long ☐ Short ☐ Work/turn ☐ Tumble ☐ Sheetwise	
	Type of Blanket	Type of Plate	Type of Packing	Dampening: ☐ Conv. ☐ Dahlgren ☐ Other ________
	Ink Sequence	Tack of Ink Instr:	Ink Additives	% Coverage / Ink Mfr. ______ Batch # S
	Fountain Solutions: pH:		Fountain Additives	Oven Type/Length ______ Web Temp:

FINISHING EQUIPMENT: Size/Make	☐ Folded	☐ Stitched
Description	☐ Perforated	☐ Trimmed

PLANT CONDITIONS	PRESS ROOM: ☐ Air Con'd ☐ Humidified ________ Temperature	WEATHER: ☐ Dry ☐ Humid; ☐ Extended Dry of Wet Weather? PLANT RH:
	STORAGE: ☐ Air Con'd ☐ Humidified ________ Temperature	How Long Did Paper Acclimatize Before Printing?

DISPOSITION

ACTION TAKEN DURING INVESTIGATION: ☐ Complete Job ☐ Lift Job ☐ Hold Paper for Replacement ☐ Other:

COMMENTS AND RECOMMENDED ADJUSTMENTS

AUTHORIZATION SIGNATURES: MERCHANT PRINTER DATE

MILL

PRINTER

MERCHANT

QUALITY REPORT

(Back of form)

SAMPLING PROCEDURES

SAMPLES SUBMITTED *(Please check)*
☐ PRINTED MATERIAL
☐ UNPRINTED MATERIAL
☐ INK SAMPLE
☐ FOUNTAIN SAMPLE
☐ TAPE SAMPLE
☐ BLANKET
☐ OTHER ______________________________

ON UNPRINTED SAMPLES: Obtain a sample in cases where a sample of satisfactory, as well as unsatisfactory paper is available, submit for comparative purposes.

SKIDS, CASES OR CARTONS: Take ten consecutive sheets, numbered in order, from at least 1" down (to avoid effects of humidity, etc.) into the original package as received from the mill. Identify top sheet of sample by grade, basis weight, order number, skid, case of carton number. Ship well packaged flat, waterproof wrapped (do not use mailing tubes).

CURL/EDGE PROBLEMS: Obtain 25 full size sheets packed flat, protected by chipboard and waterproof wrapped.

ROLLS: After soiled paper has been stripped from the roll, tear off approximately 50 feet of paper taking at least a 14" strip across the width of the roll from each round of paper. Identify by grade, basis weight, order number and roll number. It is important that paper which has lost its original finish through prolonged atmospheric exposure be removed before the sample is taken.

CONTAMINATION: Use tape to remove contaminating material from the press blanket. Affix tape to clear acetate. Do not fold tape.

INK: Capture an ink sample from the press in the canister provided and mark it.

FOUNTAIN: Capture a sample of the fountain solution in the canister provided and mark it.

BLANKET OR PLATE: If the blanket cannot be repaired, or salvaged, send it to the mill with press sheets and foreign object, or defective sheet. If a plate was damaged send it to the mill with press sheets and foreign object, or defective sheet.

OTHER CLAIMS OR RECOMMENDED ADJUSTMENTS: ______________________________

____

____

____

NOT ALL PROBLEMS ARE PAPER RELATED.

THIS IS A QUALITY REPORT, AND SO DOES NOT INCLUDE MONETARY ADJUSTMENTS.

NPTA
Developed by the
National Paper Trade
Association, inc.

PIA
Printing Industries
of America, Inc.

NAPL
National Association of
Printers & Lithographers, inc.

napim
National Association of
Printing Ink Manufacturers, Inc.

HOW TO DISAGREE AT A MEETING

It certainly isn't easy to challenge your superiors. But, there comes a time for every manager when it is necessary to strongly disagree. Disagreeing does not mean being disagreeable.

It is important to remember everyone's need to save face, reports the Sales and Marketing Executive Report. *Be cautious. Milton Hakel, a professor of industrial psychology, and others suggest a few strategies.*

1. Try going back to the original purpose of the meeting and asking, "Gee, how does that fit with what we set out to do?" This sometimes applies.

2. You might suggest looking at the issue in a broader context by saying, "I know we're only supposed to be studying this from a technical point of view, but I wonder how that solution might look if news of it got to our customers?" "Customers" could be changed to "the press," "our competitors," etc.

3. Take the "devil's advocate" position. This is usually a very acceptable way of expressing an objection.

4. If you're in a risk-taking mood, suggests Joseph Alutto, a professor of organizational behavior, co-opt what the person you disagree with has said by embracing part of his view enthusiastically, then restating the rest in a slightly altered way to fit your own view. This can work, but be cautious.

FLEXTIME STILL GROWING IN USE

29% of all businesses are now using flextime scheduling compared with 22% in 1981 and 15% reported in 1977. This, according to a study conducted by the American Management Society, shows a continuing interest in substantially changing the American work week. When asked about the future, 42% of the managers surveyed reported that they felt flextime will continue to increase in use.

For 64% of the companies surveyed, the 5-day, 40-hour work week is still the norm. For the full report, send $10 to AMS, 2360 Maryland Rd., Willow Grove, PA 19090, and ask for the "1986 AMS Flexible Work Survey."

U.S. Department of Commerce Outlook for Wholesale Trade in 1987

Each year, the U.S. Department of Commerce publishes a book entitled: *U.S. Industrial Outlook*. The report analyzes recent performance and gives a next-year forecast for over 350 different industries of the U.S. economy (manufacturing and service sectors). Copies may be obtained from the Superintendent of Documents, Washington, DC 20402 (cost $21).

Advance information has been obtained by NPTA, from the Distribution Research and Education Foundation (DREF) in Washington, regarding the wholesale trade report scheduled for January 1987 publication. Following are the major findings of this report:

- Merchant wholesaling is expected to post a sales gain of slightly over 2% in 1987. Merchant wholesalers usually account for almost 60% of total wholesale sales, over 75% of employment, and 80% of establishments. (The remainder is accounted for by brokers, commission merchants, and mfrs. sales branches).
- Merchant Wholesaler Sales increased almost 14% in 1984. However, since then the economy has not been as strong and merchants experienced only a 1% sales gain in 1985. The same is expected for 1986. Merchant wholesale sales for the first six months of 1986 were down 1% from the same year-earlier period, but were expected to have picked up in the second half of 1986.
- Employment levels have been relatively stable over the years for two main reasons: 1. The customers of most wholesale lines are so diverse that a slump in one customer-market does not hurt a firm's business enough to compel it to lay off many employees, and 2. during business downturns, most wholesale firms tend to reduce workweeks rather than lay off trained people. During 1985, the average workweek was 38.3 hours, about the same as the preceding year.
- Mergers and Acquisitions: More wholesalers, well aware of the profit potential in specialization, will either merge, buy out, open new branches, or establish specialized capabilities in-house. To illustrate this trend, a report by DREF predicts that the number of small wholesalers (under $20 million sales) will decrease 25%, to account for about 38% of all wholesalers, and their share of sales will drop by 50% by 1990.

  Medium size firms ($20–100 million) will rise to about 32% of the total and total sales for those doing $100 million annually will increase as much as 60% by 1990.
- Long Term Prospects: Assuming a pick-up in the economy, total merchant wholesalers' sales are expected to grow at an average yearly rate of 4% during the 1986–91 period. They will probably increase their dominance of the total wholesale industry in the next decade through productivity and management improvements. Many wholesalers continue to diversify into complementary commodity lines as a means of achieving greater output, smoothing out cyclical swings and meeting customer demand. To respond to rising field costs, merchants will upgrade technical skills of their inside sales organization and increase commitments to non-personal selling techniques such as telemarketing, direct mail and systems selling.

DIMENSIONS IN TRAINING CONTINUED

"The paper merchant can come to RIT and gain a thorough overview of the printer's shop in a confidential setting and in a learning environment. The center duplicates commercial conditions and in doing so, enables individuals and companies to apply new knowledge in a realistic setting without the potential hazards of trial and error in the field," Layne said. For participants, much of the value of the week came during its hands-on experiences.

Pauline Reagor from Western Paper Company in Lincoln, Nebraska, reflected a common view. "During the seminar, I learned that paper picking on the press generally is not due to defective paper . . . As a paper sales representative, now I know to inquire about ink coverage, ink tack, blanket tack, moisture level and press speed. Knowing this will be very helpful, but most of all I enjoyed the opportunity to run the two-color Heidelberg sheetfed press. It was my first experience in making color and register adjustments from a master control panel . . . WOW!"

Not only is there satisfaction in having taken part in a completed project, NPTA and RIT believe that participants leave with a thorough knowledge of the printing industry and the printing process so they can speak the printer's language, find real answers for their problems, and become better paper merchants.

The next Printech Week is scheduled at RIT April 26–May 1 at the T&E Center, a division of RIT's College of Graphic Arts and Photography. The school is an education and research resource for industry. For more for industry. For more information about Printech Week, contact Bruce Linden, NPTA, at 516-829-3070.

by James Lawrence
Seminar Coordinator
Rochester Institute of Technology

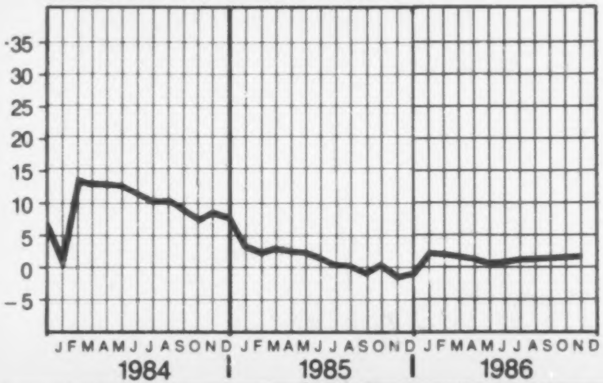
Summary National Trend Information: 1984 To Present

NOTE: *BEGINNING WITH THE JANUARY 1986 REPORT, STATISTICS WERE PRODUCED BY A NEW SYSTEM. THEREFORE, STRICT COMPARISONS TO PRIOR REPORTS SHOULD NOT BE MADE.*

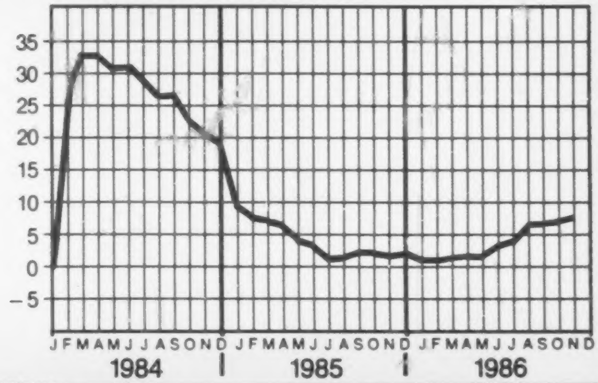
SALES INFORMATION

YEAR-TO-DATE SALES PER SELLING DAY AS A PERCENTAGE OF PREVIOUS YEAR'S YEAR-TO-DATE SALES PER SELLING DAY

INDUSTRIAL PAPER SALES NATIONALLY



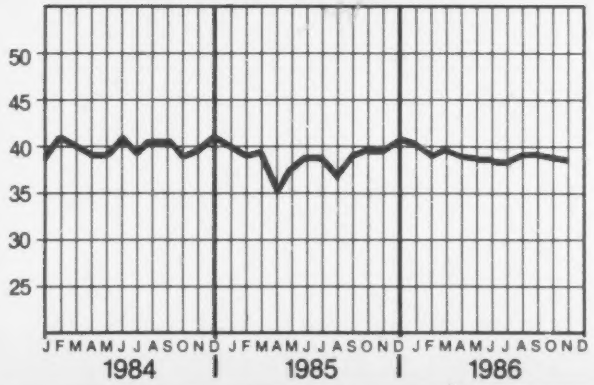
PRINTING PAPER SALES NATIONALLY



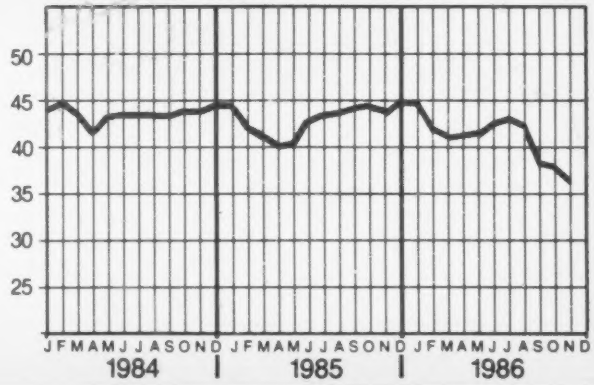
RECEIVABLES INFORMATION

DAYS OUTSTANDING—ACCOUNTS AND NOTES RECEIVABLE FROM PAPER SALES AT END OF EACH MONTH (IN CALENDAR DAYS)

INDUSTRIAL PAPER RECEIVABLES NATIONALLY



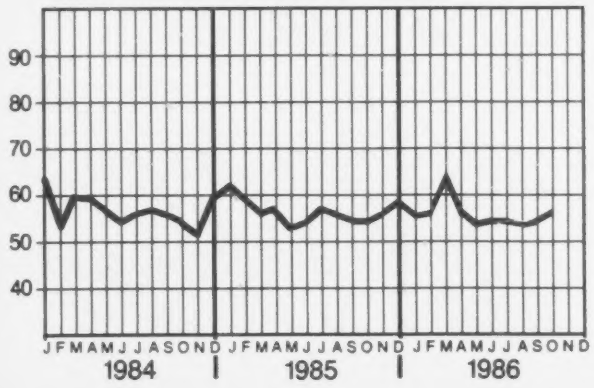
PRINTING PAPER RECEIVABLES NATIONALLY



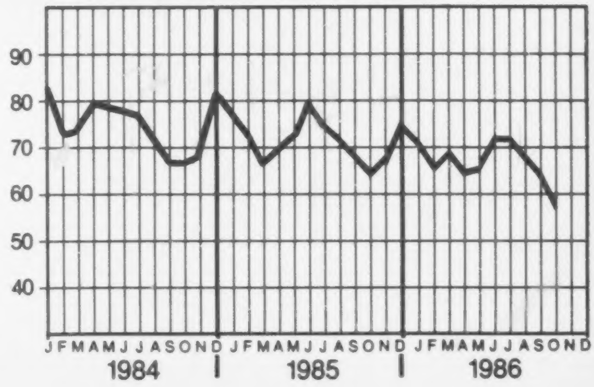
INVENTORY INFORMATION

CALENDAR DAYS COST OF ENDING MONTHLY INVENTORY (FIFO) (IN CALENDAR DAYS)

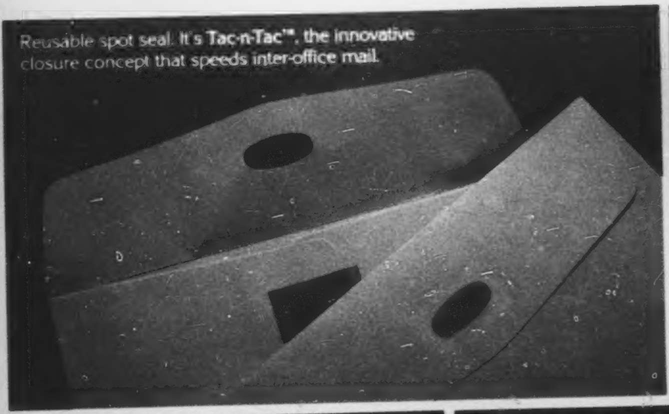
INDUSTRIAL PAPER INVENTORY NATIONALLY



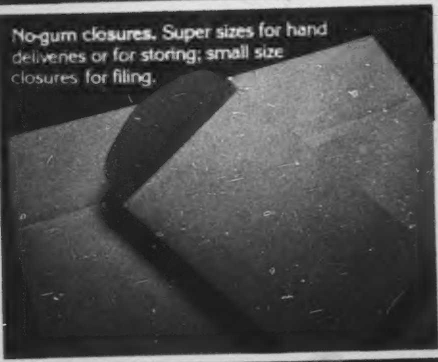
PRINTING PAPER INVENTORY NATIONALLY

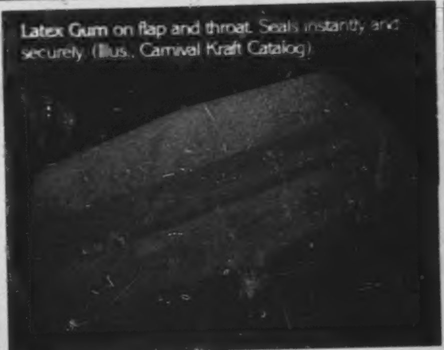


Who but National Envelope offers you so many closures?

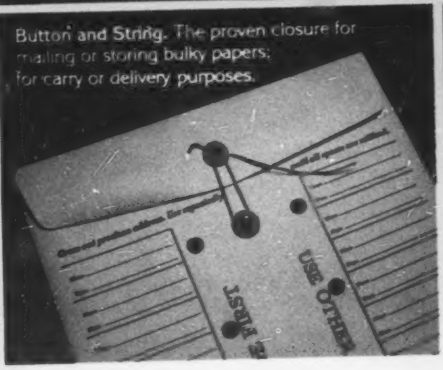

Reusable spot seal. It's Tac-n-Tac™, the innovative closure concept that speeds inter-office mail.

Strip and Grip®, latex gum closure kept fresh by protective release paper.


No-gum closures. Super sizes for hand deliveries or for storing; small size closures for filing.


Latex Gum on flap and throat. Seals instantly and securely. (Illus., Carnival Kraft Catalog)

Bank Statement Latex Gum Envelopes. The efficient way to seal and send bulky contents.


Button and String. The proven closure for mailing or storing bulky papers; for carry or delivery purposes.

Dextrine gum closure. The universal closure available in any style and size envelope under the sun.

Clasp. The proven closure for mailing or storing bulky papers, for carry or delivery purposes.

Grow with National

The New York / National Envelope Group:

New York Envelope Corp., Long Island City, NY, 11101, 718 / 786-0300, 800 / 221-9551.
Envelope Convertors, Inc., Brooklyn, NY, 11237, 718 / 386-6000, 800 / 221-0605.
Champion Envelope Corp., Union, NJ, 07083, 201 / 353-8100, 800 / 526-6829.
National Envelope Corp., Worcester, MA, 01607, Box 1728, 617 / 798-8711.
Austell (Atlanta), GA, 30001, 404 / 944-3322, 800 / 241-8173.
Lenexa, KS, 66215, 913 / 888-3282, 800 / 255-6288.
Vinita Park (St. Louis), MO, 63114, 314 / 423-6700,
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